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Local School Districts do Little to Protect Themselves from Conflicted Advisers

June 29, 2016 | By Rory Appleton | www.fresnobee.com

EXCERPT: After the federal government [recently fined](#) a prominent former superintendent for allegedly playing both sides in several school financial deals, a review by *The Bee* shows that many Valley school districts don't have safeguards to prevent possible conflicts of interest. And because these districts don't police these possible conflicts, well-connected contractors can reap hundreds of thousands of dollars in public funds.

The U.S. Securities and Exchange Commission censured School Business Consulting, a company owned by former Clovis Unified Superintendent Terry Bradley, for allegedly helping Keygent LLC of El Segundo ace its interviews with five California school districts. Keygent is a financial advisory firm that has [worked on many local education bonds](#).

Bradley, who currently works as an education adviser, was accused of sharing interview questions and information on competitors before Keygent's meetings with the districts, which also were employing him.

The SEC never identified the five districts. Attempts to reach the SEC for further comment were not successful.

The SEC said Bradley was paid \$2,500 per month from September 2010 to presumably June 2016, when it barred him from working with financial advisers. He declined to be interviewed for this story. ...

... Since 2010, Bradley made \$845,000 from his contract work with districts and his consulting work with companies awarded district projects. His pension with Clovis Unified also paid him \$1,034,585 since 2011.

Bradley is a former chairman of the *Coalition for Adequate School Housing*, which advocates for the state's school bonds and contractors in the school construction industry. CASH also has defended school districts' use of "lease-leaseback" contracts amid recent scrutiny of the financing process.

Harris Construction has sponsored CASH events, including its annual conference and golf tournament.

Tom Duffy, legislative director for CASH, said Bradley still is affiliated with the organization, which represents 1,500 school districts, county offices and private businesses. Duffy called him a "credible, honorable man." ...

To read the complete article please visit:
www.fresnobee.com/news/local/education/article85936892.html

El Monte Union Lacks Records, Oversight for \$148 Million Bond Measure

June 25, 2016 | By Courtney Tompkins | www.sgvtribune.com

EXCERPT: El Monte Union school district has spent millions of dollars in bond funds without any independent oversight for the past two years, which experts say is a violation of the law and raises several red flags.

When asked for records of expenditures paid with funds under a \$148 million construction bond - including supporting invoices, contracts and board approval of payments - the El Monte Union High School District was unable to provide any documents from January 2014 to the present.

When voters approve a school bond measure in California, Proposition 39 requires school districts to establish bond-oversight committees charged with reviewing expenditures and financial reports and ensuring the projects promised to voters are done on budget and on time. El Monte's committee has not met since January 2014, and as of June 2015, documents show the committee was disbanded.

Attorney Kelly Aviles of the watchdog group *Californians Aware* called the revelation "troubling."

"We are talking about millions of dollars here, and they are not following any of the procedures," she said. "It's basically impossible for them to not have records. Either they've illegally deleted things or they are not properly responding to our records request and withholding responsive records." ...

... *The California League of Bond Oversight Committees*, a volunteer organization of current and past bond-oversight committee members, has laid out a set of guidelines for school districts based on California law. The El Monte district appears to not be in compliance with a number of them.

... Gil Aguirre, an open-government advocate, originally filed the records request for the documents. The district responded that it "did not have documents responsive to this request." The district has yet to respond to a similar records request made June 16 by this news organization.

Aguirre said accountability with public money is paramount. "The bond programs play an important part of improving our communities," he said, "but they are also ripe for fraud. The state understands that and has said 'We have got to have independent oversight to make sure these abuses can't and don't take place,' and this district is just ignoring that mandate."

Numerous requests for comment made to the offices of district Superintendent Edward Zuniga, as well as the district's chief business officer, Cynthia Shieh, were not returned.

Former board member Salvador Ramirez, who left the district in November, said it was the chief business officer's responsibility to manage oversight. Due to turnover in the department, he said, there was some confusion over who was handling it. ...

To read complete article please visit:
www.sgvtribune.com/government-and-politics/20160625/el-monte-union-lacks-records-oversight-for-148-million-bond-measure

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Mission Statement

To promote school district accountability by improving the training and resources available to California's Proposition 39 School Bond Oversight Committees and educating the state legislature, local school boards and the public about the oversight and reporting powers these Citizens' Bond Oversight Committees (CBOCs) have, and to advocate on a state level, where appropriate, on issues of common concern to all CBOCs.

**CaLBOC:
CBOC Operation
Guidelines**
Provides a basis for the BOC to perform a self-assessment of their operations and identify training needs. Could use as outline to develop a training program for committee members.
[PDF](#)

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