

**California Association of Bond Oversight Committees  
Board of Directors Strategic Planning Retreat  
January 15, 2022 from 11:00 AM to 1:00 PM**

12 ATTACHMENTS (in order, below), 30-PAGES in total

- There are eleven (11) Microsoft Word documents attached, as well as one (1) Microsoft Excel spreadsheet.
- Together, these comprise the "chapters" for the Retreat, consistent with the Retreat's Agenda.
- In total, there are thirty (30) pages included in all of these documents.

**Chapter 1:** "CABOC Retreat Title Page.docx", 3-pages. **1**

**Chapter 2:** "CABOC Strategy Retreat Agenda.docx", 2-pages. **2**

**Chapter 3:** "Safety Moments.docx", 3-pages. **5**

**Chapter 4:** *The Survey Results*. **7**

- "CABOC Strategic Plan Survey.docx", 2-pages. **10**

- "CABOC Strategy Survey Results.docx", 3-pages. **12**

- "CABOC Sample Survey Chart.xlsx", 1-page. **15**

**Chapter 5:** *The USC Study*.

- "CABOC Strategic Plan Synopsis.docx", 3-pages. **16**

- "CABOC Synopsis Q Excerpt.docx", 2-pages. **19**

**Chapter 6:** *Is CABOC Ready for Strategic Planning?*

- "CABOC What is a Strategic Plan.docx", 3-pages. **21**

- "CABOC Purpose Goals Customers.docx", 3-pages. **24**

**Chapter 7:** Closing documents.

- "CABOC Retreat Cartoons.docx", 4-pages. **27**

- "CABOC Retreat Close Out Page.docx", 1-page. **31**

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**My contact info** is included with my signature (below) and is also listed on Page 2 of the Chapter 2 "Agenda" document, listed above. Anyone wishing to discuss any of these documents, or any related topics that may come up, should please be invited to contact me any time they'd like.

**Best regards always and**

**Please stay corona-free,**

**Gregg Visineau**

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Saturday, January 15<sup>th</sup> 2022

California Association of Bond Oversight Committees (CABOC)

❄️ ❄️ HAPPY NEW YEAR! ❄️ ❄️

And WELCOME to the Retreat:

*Is CABOC ready for  
strategic planning?*

## California Association of Bond Oversight Committees (CABOC)

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*What is and is not going to happen today, anyway?*

✓ We'll be "retreating" virtually, via Zoom, and not mingling in person.

I'll be moderating, retreat-style, and not teaching, seminar-style.

✓ You MUST interrupt, interject...blurt out comments, questions...

...as if we're together in person. If not, the Retreat will not work!

✓ We will NOT be working on an actual strategic plan...

...but we will explore whether one might have value for CABOC.

✓ We won't be setting goals or timelines, or redistributing priorities and resources...

...but hopefully we'll get a feel for their importance to CABOC.

*Let's try our hands at some new stuff, shall we?*

Saturday, January 15<sup>th</sup> 2022

## California Association of Bond Oversight Committees (CABOC)

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“Plans are worthless, but planning is everything”.

*Anonymous, via Dwight D Eisenhower, c.1950*

“Everybody has plans until they get hit for the first time”.

*Mike Tyson, Atlantic City, 1987*

## Today's Agenda

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- ✓ Welcome to the Retreat: 5-minutes  
What is and is not going to happen today?
- ✓ A Moment for "Operational Excellence" 10-minutes
- ✓ Review the Survey results: 45 (incl break)  
What do they mean for CABOC?
- ✓ Review the "USC Study": 45 (incl break)  
Is it any use to CABOC? How? Or why not?
- ✓ What, if anything, should CABOC do next re strategic planning? 30 (incl break)
- ✓ Close-out: Action items, next steps and +/- 15-minutes  
2 ½ hours

**Gregg Visineau**  
**El Cerrito, CA (1982-now)**

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Home: 510 236 0761

Mobile: 510 207 5069

**Former Member:**

West Contra Costa Unified School District CBOC.

California Association of Bond Oversight Committees.

**Chevron Corporation, 1981 – 2009:**

Logistics & Trading, Mergers & Acquisitions, Strategic Planning  
& Analysis, Operational Excellence, Emergency Response...etc.

**University of California, Berkeley:**

Bachelor's Degree in Mechanical Engineering (1977).

Master's Degree in Engineering, Naval Architecture (1979).

Master's Degree in Business Administration (1981).

December 2021

## A Moment for “Operational Excellence”

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**WHY?** To infuse the organization’s culture with a sense of mutual caring, mutual responsibility for excellence in all your operations:

☞ “Just getting by”, “doing the minimum”, “letting it slide”, “skirting the issue”, “muddling along”, “good enough, we’ll fix it later” can all become practices of the past. “Operational excellence” becomes the rule, not the exception, part of your DNA.

**WHO, WHAT, WHEN, WHERE?** Share an operational “best practice” to start every meeting. 1-5 minutes max, with the topic chosen – and the content produced and presented – by any attendee. It should not usually be the senior manager in the room (or on the Zoom call), nor should it regularly be the facilitator or the agenda-owner.

You might take a moment (or two...or three) to share what excellence actually looks like in product quality, customer relations, system reliability, teamwork and communications, health and safety, budget management, decision-making, etc.<sup>1</sup>

As an example for CABOC, consider starting with something simple:

“Acknowledge receipt of all emails and texts, whether a direct recipient, a copied recipient or a blind copy. DO NOT REPLY ALL. Just simply acknowledge you got the note, 1-on-1 back to the sender”.

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<sup>1</sup> See, for example, the “LPS+™ (Loss Prevention System+™), which is a comprehensive management system designed to help organizations prevent **all types of losses** (personnel safety, process safety, reliability, product quality, etc.).” [GV’s emphasis]

## Ten Tenets of Operational Excellence

In the field, at the plant; in the office, at home; for employees, for volunteers; for quality products, for reliable systems; for on-time deliveries, for satisfied customers; for environmental health and for the well-being of your personnel (their health and safety, both on the job and at home):

1. "Always operate within design or environmental limits"
2. "Always operate in a safe and controlled condition"
3. "Always ensure safety devices are in place and functioning"
4. "Always follow safe work practices and procedures"
5. "Always meet or exceed customers' requirements"
6. "Always maintain integrity of dedicated systems"
7. "Always comply with all applicable rules and regulations"
8. "Always address abnormal conditions"
9. "Always follow written procedures for high-risk or unusual circumstances"
10. "Always involve the right people in decisions that affect procedures and equipment"

Relevance for CABOC?



# 10 Prospective Safety Moments

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1. “Adjusting your side view mirrors”  
Topic: Eliminating blind spots for safer driving.
2. “What is *WorkPace* – Balanced Ergonomics”  
Topic: How to avoid RSI’s at home or office.
3. “6 Tips to Beat Zoom Fatigue”  
Topic: For more effective virtual engagements.
4. Home emergency planning  
Topic: Before, during and after an emergency.
5. Ladder safety  
Topic: Safe work practices at heights.
6. “The Smith 5Keys”  
Topic: From the *Smith Safe Driving System*.
7. “Christmas Tree "Fire-Retardant" Solution”  
Topic: Natural, easy-to-use tree safety.
8. Exercise safety at home  
Topic: Equipment, programs, injuries.
9. Safe lifting, moving and set down  
Topic: Prevent injury from large heavy objects
10. Spare battery storage & disposal  
Topic: Avoid shocks, burns, fires

Phrases within “quotations” are Google (or other) verbatim search entries which will lead you directly to key information for the safety topic-at-hand. The others are so generic as to have multiple sites available for your own personal research, if you’re so inclined.

## IS CABOC READY FOR “STRATEGIC PLANNING”?

Let’s find out!

Please take five minutes (or less) to fill out this 3-question Survey.

Your anonymity is protected. No one will know which answers are yours.

Overall results will be shared, also compiled to protect your anonymity.

PLEASE CHECK ONE BOX  ONLY. Select the answer which best suits you now.

① How important is it for CABOC to develop and deploy a strategic plan?

- Very important.** It should be our top priority.
- Important.** It should be one of our Top 3 priorities.
- Somewhat important.** It’s a priority, but only after our Top 3 or Top 5 are taken care of first.
- Not important at all.** Time and effort is best spent elsewhere.
- No opinion or Decline to state.**

② What do you know about “the USC Study” for CABOC?

- A lot.** I read it from cover-to-cover.
- I have an overview.** I quickly scanned the report.
- I have some specific knowledge.** For example, I read the Executive Summary only; or I jumped straight to the Recommendations.
- Very little.** I haven’t had the time yet to look at it.
- Never heard of it or Decline to state.**

③ What do you know about strategic planning?

- A lot.** I have hands-on strategic planning and deployment experience.
- Some.** I've worked in organizations which have developed and deployed their strategic plans.
- A bit.** I've heard the words "strategic plan".
- Nothing much at all,** but I'd like to know more about strategic planning and deployment.
- No experience** or **Decline to state.**

# California Association of Bond Oversight Committees (CABOC)

## Survey Results: Data & Statistics

Questions	Survey Answers					Totals
	"A Lot"	"Some"	"A Bit"	"Very Little"	"None/DTS"	
Knowledge of Strategic Planning	4	8	2	2	0	N = 16
USC Awareness	3	1	1	4	7	N = 16
Importance to CABOC	7	3	2	2	2	N = 16
Results	Statistics					Totals
Ready for SP?	29%	25%	10%	17%	19%	100%
Column Totals	14	12	5	8	9	48

N = total number of Survey respondents

DTS = "Decline to State"

## GV's Interpretation of Results

- **N = 16 respondents**, ≤ 1% of the total number of surveys distributed.

This is NOT necessarily a reflection of CABOC engagement, but might rather be a reflection of the appetite for survey-taking (or strategic planning!) in the first 10-days of the new year. Beware of drawing false conclusions...keep it simple!

- What % of respondents knows a lot about strategic planning? **25%**

This could help identify who "leads the charge" for CABOC! If this is 0%, though, or less than, say, 10%, then that's a potential harbinger of "trouble ahead" for CABOC with respect to any strategic planning at all, much less successful implementation and deployment.

## California Association of Bond Oversight Committees (CABOC)

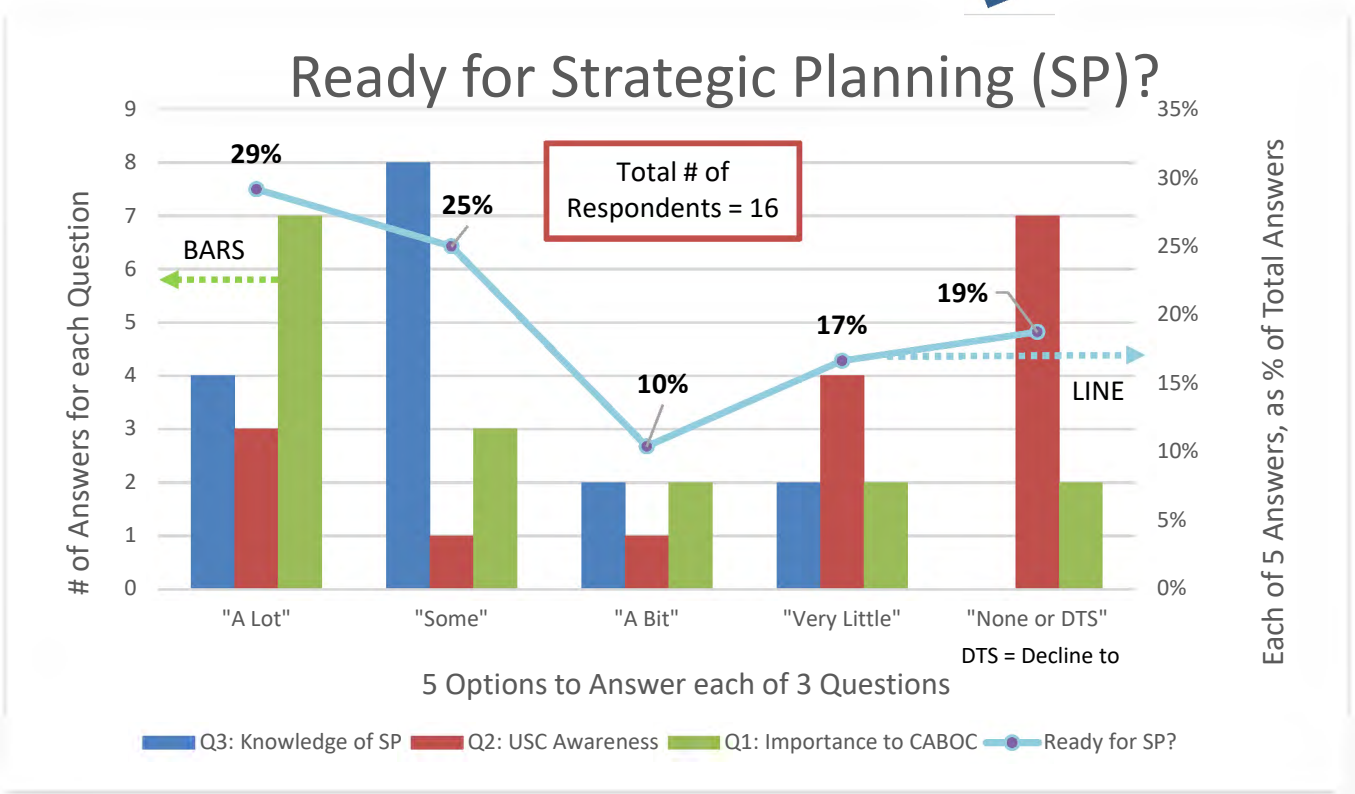
- What % of respondents knows little or nothing of the "USC Study"? **69%**

This could point to a more "in-depth session" on the USC Study, to help bring these members up-to-speed on what it says and what it means for CABOC.

- What % of respondents places strategic planning as a top priority? **63%**

If this is not a significant percentage – say, greater than a third, or greater than 40% or so (i.e., "near enough" to 50%, or half) – then maybe "now" is not the time to bite off and try to chew on real strategic planning at CABOC!

- So, is CABOC ready for strategic planning? Let's look at the graph below:



## California Association of Bond Oversight Committees (CABOC)

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### ③ What do you know about strategic planning?

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# CABOC SURVEY RESULTS

Jan 15th  
2022

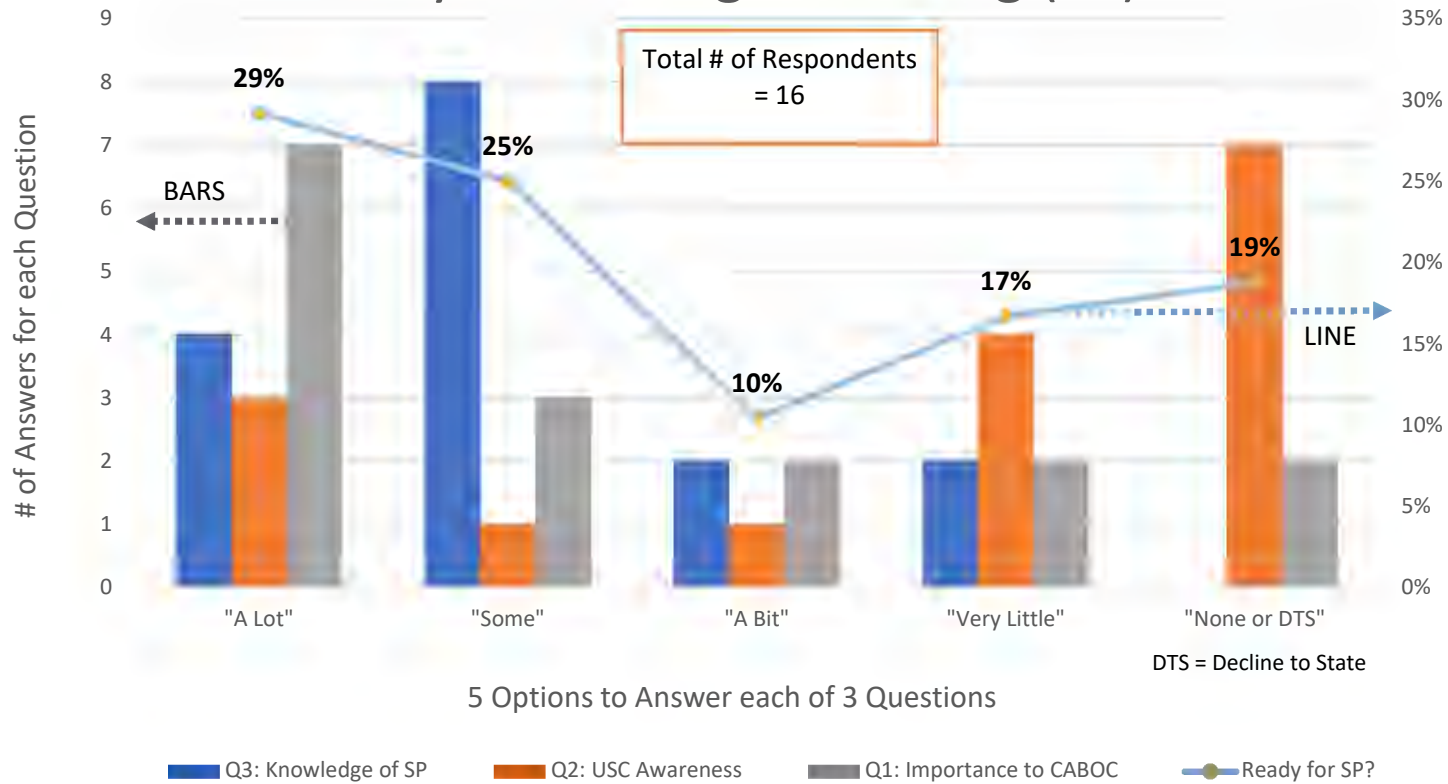
A1/N 25%  
(D2+E2)/N 69%  
(A3+B3)/N 63%

	"A Lot"	"Some"	"A Bit"	"Very Little"	"None or DTS"	Total
<b>Q3: Knowledge of SP</b>	4	8	2	2	0	16
<b>Q2: USC Awareness</b>	3	1	1	4	7	16
<b>Q1: Importance to CABOC</b>	7	3	2	2	2	16
<b>Ready for SP?</b>	29%	25%	10%	17%	19%	100%
<b>Column Totals</b>	14	12	5	8	9	48

Raw  
Survey  
Results

OK

## Ready for Strategic Planning (SP)?



## California Association of Bond Oversight Committees (CABOC)

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# COULD CABOC USE ITS OWN “STRATEGIC PLAN”?

## Check it out...

First off, USC’s Sol Price School of Public Policy seems to think so, in its report for CABOC entitled:

*“Bond Oversight Done Right: A Sustainable Strategic Plan for the California Association of Bond Oversight Committees (CABOC)”*, August 13<sup>th</sup> 2021.

Why does USC think so? Here’s one person’s – my personal – synopsis [*“a brief summary or general survey”*] of that report. I hope you find it helpful for your work. At the least, I hope you find it interesting enough to read to the end.

“Strategic plans are an efficient way for organizations to establish goals related to time. Strategic plans are critical to tracking progress over time and allowing the organization to self-assess and improve through the redistribution of resources where they are most efficient.”  
[USC report cited above, page 5]

This is as good as it gets regarding the proper and intended **USE** of a good strategic plan. If you buy into this from USC, or if you think CABOC already does a good job of *“establishing its goals”*; if you already *“track progress over time”* AND *“self-assess”* that progress against achieving your goals; and if you *“improve through the redistribution of resources where they are most efficient”*, then maybe you’ve been using “strategic processes” even if you didn’t know it.

The California Association of School Business Officials (CASBO, founded in 1928), speaks equally well to the **VALUE** of strategic planning (what they call “organizational planning”):

“CASBO by Design”

“For the past 16-years, CASBO has been dedicated to the organizational planning discipline as a method for guiding the association into a successful future. Last year, the association completed its sixth such plan, CASBO by Design 2.0, a living, breathing document that guided the association in its long-term planning process, which is grassroots in nature, invigorating in procedure and motivating in outcome. Work on our next strategic plan will begin later in 2021.



“CASBO has long been committed to organizational planning because the approach has consistently helped the association envision its future and determine the clear steps to get there. The road map that strategic planning provides has allowed CASBO to remain focused on its unique mission, goals and objectives and to respond effectively to a continually changing environment.”

**So there you have it:** A simple, clear paragraph from USC on the **use** of strategic planning. And two equally simple and clear testimonial paragraphs from a long-running organization (CASBO) on the **value** of such plans.

**Now then, to CABOC:**

The FIVE recommendations from USC (bulleted ●, below) can be put in TWO broad categories, which is a good thing for CABOC members and for the public (on the receiving end of CABOC’s efforts):

- ① **Improve your organizational capabilities; and**
- ② **Deliver on your purpose.**

That’s it...that’s what USC is recommending as your most immediate strategic planning objectives. How simple is that? Can – or should – CABOC dig any deeper for value from strategic planning? Or should it just continue advancing on multiple fronts, managing resources on an ad hoc basis?

① **Continually improve the organization’s capabilities to deliver on its purpose.** This is an INTERNALLY-focused strategy; and is very common across organizations, although the FOUR elements recommended by USC are specific to CABOC:

- **Succession planning** (also known as personnel development, replacement planning, leadership development). USC applies this to your key current personnel.

But CABOC should ask itself: What about key positions NOT currently in place, such as webmaster, librarian/archivist, event manager, etc? Where is your “institutional memory” currently housed and to-be-housed?

- **Financial consultant.**

CABOC should ask itself: Is the consultant the means to an end: Raising more money for operations? Or is it an adjunct to other inhouse means of raising funds that do NOT require a consultant?

- **Performance metrics** (also known as key performance indicators, KPI’s), which are data-driven measures of behaviors, activities and progress towards delivering on your purpose. These are not easy, are not usually self-evident, but are oh-so-important to sustained success.

- **Organizational structure.**

“Form should follow process”, not the other way around. CABOC should ask itself: What organizational structure, what key positions, best facilitate your delivering on your purpose?

② **Focus on your purpose.** This is an EXTERNALLY-focused strategy; and is also very common.

- **Training development and deployment.**

CABOC should ask itself: What about your other purposes? For example, being a statewide champion for real and lasting CBOC independence? Formation of regional CBOC groups? Representing common interests at the statewide level? Where do these fit into your overall strategy, alongside “training development and deployment”?



Finally, any CABOC strategic plan is only as good as its implementation plan AND its **effective** deployment (i.e., execution) thereof. For example:

**Implementation Plan and Deployment**

To successfully improve your **Organizational Capabilities**: These four elements (and any more which CABOC may add or subtract) should be **ranked** in order of importance and their timing for delivery. Or can they – much less should they – be worked in parallel with one another? Does the current organization and membership have the capacity AND the capabilities to work them in parallel?

To successfully deliver on your **Purpose(s)**: This element – training – (and any more which CABOC may add or subtract) should be **ranked** in relation to the organization’s capabilities, above. For example, does the organization need to achieve some minimum level of organizational capabilities across those four elements before focusing on its purpose(s)? Or can it work the purpose – or some of its purposes – in parallel with improving its capacity AND its capabilities?



## California Association of Bond Oversight Committees (CABOC)

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# COULD CABOC USE ITS OWN “STRATEGIC PLAN”?

Let's take a shot at some of these questions from the synopsis of the “USC Report”, which was your “homework” to help energize the conversation today:

- ? Can – or should – CABOC dig any deeper for value from strategic planning? Why? Or why not?
- ? Succession Planning: What about key positions NOT currently in place, such as webmaster, librarian/archivist, event manager, etc? Where is your “institutional memory” currently housed and to-be-housed?
- ? Financial Consultant: Is the consultant the means to an end: Raising more money for operations? Or is it an adjunct to other inhouse means of raising funds that do NOT require a consultant?
- ? Organizational Structure: What organizational structure, what key positions, best facilitate your delivering on your purpose?
- ? Training Development and Deployment: What about your other purposes? For example, being a statewide champion for real and lasting CBOC independence? Formation of regional CBOC groups? Representing common interests at the statewide level? Where do these fit into your overall strategy, alongside “training development and deployment”?

### Implementation Plan and Deployment

- ? Organization Capabilities: These four elements (and any more which CABOC may add or subtract) should be **ranked** in order of importance and their timing for delivery. Or can they – much less should they – be worked in parallel with one another? Does the current organization and membership have the capacity AND the capabilities to work them in parallel?
- ? Purpose(s): This element – training – (and any more which CABOC may add or subtract) should be **ranked** in relation to the organization's capabilities, above. For example, does the organization need to achieve some minimum level of organizational capabilities across those four elements before focusing on its purpose(s)? Or can it work the purpose – or some of its purposes – in parallel with improving its capacity AND its capabilities?

## California Association of Bond Oversight Committees (CABOC)

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### “CONTRAST & COMPARE”

This is how USC posed its own questions for any strategic planning process that CABOC may choose to embark on, now or in future. Some inevitably mirror those from my synopsis of the “USC Report”, while others pose different flavours of questions you may already have asked and answered amongst yourselves. The underlined categorizations are mine:

#### What’s the value of a strategic plan, anyway?

“How will a sustainable strategic plan help CABOC develop organizational goals and objectives that assess progress over time?”

#### Re: Financial Consultant

“How can CABOC diversify its revenue stream to provide a more stable and sustainable financial structure? What tools and best practices can they employ to achieve their organizational goals?”

#### Re: Organizational Structure

“How can CABOC be best organizationally structured to support its mission?”

#### Re: Training Development and Deployment

“How can CABOC facilitate an effective and easy-to-access training program to meet the needs of its constituents?”

#### Re: Performance Metrics

“How can performance metrics serve CABOC to transform their mission, strategy, and organizational goals into key measurable performance indicators that govern organization actions? Which performance measurement model best serves to achieve their organizational goals?”

NOTE from GV: This is, by far, one of the single most difficult elements of good strategic planning to get right. And: It’s critical for successful deployment and implementation!

# California Association of Bond Oversight Committees (CABOC)

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Gregg Visineau  
December 2021

## CABOC's Purpose, Goals and Customers (Clients)

### Current Purpose Statement

The *California Association of Bond Oversight Committees* is dedicated to the proposition that taxpayers deserve information on proper school bond expenditures through facilitation of independent citizens' bond oversight committees in accordance with the passage of Proposition 39 (School Facilities. 55% Local Vote. Bonds, Taxes. Accountability Requirements.)

Our mission is to develop and deliver support for thorough oversight through training, newsletters, conferences and workshops; and to represent our collective interests at the statewide level to benefit all Californians.

Approved by the CABOC Board of Directors on December 11, 2021 subject to ratification by CABOC Members at the January 15, 2022 Annual Membership Meeting.

### Purpose Statement at Founding

"The purpose of this Association is to provide training, assistance, and encouragement to California School Proposition 39 Citizens' Bond Oversight Committee Members through development of training materials, delivery of online training, conferences, workshops, formation of regional groups of California Citizens' Bond Oversight Committees and representing common interest at the statewide level."

What does this change tell you, if anything, about the evolution of CABOC since its founding over two-years ago? What does it tell you about CABOC's goals, then and now?

## The mission always comes first...

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“I believe that this Nation should commit itself to achieving the goal, before this decade is out, of landing a man on the Moon and returning him safely to Earth.”

“To make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.”

“To refresh the world...To inspire moments of optimism and happiness...To create value and make a difference.”

“We provide the highest quality education to enable all students to make positive life choices, strengthen our community, and successfully participate in a diverse and global society.”

“We inspire, educate and outfit for a lifetime of adventure and stewardship.”

“The increase and diffusion of knowledge.”

President Kennedy to a Joint Session of Congress, May 25<sup>th</sup> 1961. National PTA. Coca Cola. WCCUSD. REI. The Smithsonian.

...except when it doesn’t!

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“Ah, Ryan...I don’t know anything about Ryan. I don’t care. The man means nothing to me. It’s just a name. But if, you know, if finding him so that he can go home. If that earns me the right to get back to my wife, then that’s my mission.”

Captain Miller (Tom Hanks) in *Saving Private Ryan*, 1998.

## What exactly, then, are CABOC's goals?

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Are they time-based, e.g. short-, medium- and long-term?

Is there a timeline for achieving them? A contingency plan if you don't?

Are there identified milestones, between now and then, to assess progress?

Do you have the resources (people, money, etc) to achieve them? What if you don't?

Do all your Goals – and the activities attached to them – serve your Purpose?

## Who are your customers, your clients?

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Concerned Citizens?

Parents?

Districts?

Prospective CBOC'ers?

Seniors?

Students?

Boards?

Current CBOC'ers?

Renters?

Teachers?

Auditors?

School bond "newbies"?

Owners?

PTA's?

Legislators?

Bond fund "experts"?

Landlords?

Unions?

Journalists?

Property taxpayers?

Who else? Any of these? None of these? How do you know? Does it even matter?

## California Association of Bond Oversight Committees (CABOC)

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### WHAT EXACTLY IS THIS THING CALLED A “STRATEGIC PLAN”?

“Strategic plans are an efficient way for organizations to establish goals related to time. Strategic plans are critical to tracking progress over time and allowing the organization to self-assess and improve through the redistribution of resources where they are most efficient<sup>1</sup>.”

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<sup>1</sup> Source: “*Bond Oversight Done Right: A Sustainable Strategic Plan for the California Association of Bond Oversight Committees (CABOC)*”, August 13<sup>th</sup> 2021, Page 5.



## California Association of Bond Oversight Committees (CABOC)

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Let's discuss these *4 Key Elements* of an *effective* Strategic Plan:

- ① Establish goals related to time.
- ② Track progress over time.
- ③ Self-assess.
- ④ Improve through the redistribution of resources where they are most efficient.

Gregg Visineau  
December 2021

## California Association of Bond Oversight Committees (CABOC)

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Before we go any further, though, let's consider the following:

Are you a single parent? You're likely a strategic planner, too.

Working parents with kids in school? Strategic planning, anyone?

What about a college student away from home for the first time?

Or a volunteer who also works? Do you juggle time & priorities?

Do you have emergency supplies at home? Do you practice your evacuation & recovery plan? Any shades of strategic planning?

## Action Items

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## Next Steps

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+/ $\Delta$

“Plus/Delta”

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The +’s: What worked, what to keep?

The  $\Delta$ ’s: What should be changed, fixed?