



California Association of Bond Oversight Committees

A California Public Benefits Corporation # 4319346 formed September 19, 2019
Bond Oversight Done Right

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ANNUAL REPORT 2021

Bond Oversight Done Right: A Sustainable Strategic Plan for the California Association of Bond Oversight Committees recommendations: create a succession plan, allocate funding to hire a financial consultant, rework the organizational structure, create training videos, and develop performance measurement. (USC Report, August 13, 2021)

The focus for 2021 was to increase the capacity of California Association of Bond Oversight Committees (CABOC) to deliver support to independent citizens' bond oversight committees (CBOC).

Highlights for the year:

Conference Zoom October 16, 2021: Attended by 85 participants, ten presentations, Moss Adams, LLP conference sponsor payment of \$5,000, many questions answered during conference and in writing after the conference. Conference chair Tom Rubin.

Bond Oversight Done Right: A Sustainable Strategic Plan for the California Association of Bond Oversight Committees (67 page report) prepared by University of Southern California, Sol Price School of Public Policy, August 13, 2021. This free report (a value of \$50,000) provides a roadmap for CABOC to increase its capacity to provide services to CBOCs.

Legislative Proposal: A comprehensive legislative proposal was prepared and presented to California State Treasurer Ma, and State Senators Roth, Glazer and Skinner. This proposal would implement the Little Hoover Commission 2017 legislative recommendations made to the Governor and Legislature. Commission Chair Nava December 13, 2021 letter to State Treasurer Ma supported the CABOC legislative program. Legislative Committee Co-Chairs Sallie DeWitt and Jason Hunter.



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Constant Contact Electronic Marketing Database: At year end there were 4,742 unduplicated contacts (318 at December 31, 2020) in the following categories – CBOC current/former members 2,056; CABOC voting members 50; newsletter subscribers 877; associations 42; County Auditors-Controllers 55; county boards of education presidents/superintendents/chief business officials 151; certified public accountant firms 93; community college boards of education presidents/superintendents/chief business officials 131; K-12 boards of education presidents/superintendents/chief business officials 1,097; legislature 111; media 80; state officials 97, taxpayer associations 24. Leads Denise Sheehan, Linda Lozito and Lorraine Humes.

Website bondoversight.org: major enhancements including about CABOC; governance (minutes, financial statements, board, advisors and staff directories); CABOC conference; FAQ; best practices; resources; help desk; poor management practices; and external sites (32). Web Mistress Linda Lozito.

The CABOC Digest: Published twenty-two issues with news and best practices. Editor Linda Lozito.

Training Materials: FAQ published and posted to website 31; FAQ in production 15; best practice memorandum of understanding published (currently being updated); three resource documents in production. Training Materials Committee chair is Marcus Crawley.

Amicus Curiae Brief: CABOC in the Supreme Court of the State of California, Stephen K. Davis v. Fresno Unified School District, Docket no. F079811.

California Database CBOCs: Active committees K-12 and community college is 519.

I welcome your questions/comments/requests/recommendations by telephone or email anytime day/night.

For bond oversight done right.