



CALIFORNIA ASSOCIATION OF BOND OVERSIGHT COMMITTEES

INDEPENDENT CITIZENS' OVERSIGHT COMMITTEES

SATURDAY, OCTOBER 14, 2023

SPONSORED BY MOSS ADAMS

AGENDA

- **9:30 am** Registration
- **10:00 am** Welcome. Carolyn Castillo, CABOC President
- **10:05 am** Zoom Orientation
- **10:10 am** **KEYNOTE: MOSS ADAMS, LLP. Bond Program Capital Program Management: Best Practices for Schools and Oversight Committees**
Presenters:
 - Stephen Bacchetti, Partner, CPA, CIA, CCA
 - Tammy Lohr, Senior Manager, CFE, ODCP
 - Arthur Ngo, Senior Manager, CPA
 - PDF of Presentation
- **10:55 am** **The El Rancho Unified School District's Story: How One CBOC Member Made a Difference!**
Presenter: Carolyn Castillo, CABOC President, former El Rancho USD CBOC and former school board member
 - PDF of Presentation
- **11:40 am** **Ask the Experts with Four Veteran CBOC Members and Q&A**
Presenters:
 - Michael Bishop
 - Michael Frattali
 - Anton Jungherr
 - Tom Rubin
 - PDF of Bios
- **12:25 pm** **Bond Oversight Committee Academy Announcement of CABOC's New Online 25 Training Courses**
- **12:40 pm** **CABOC Annual Awards**
 - CABOC Member of the Year
 - CABOC Person of the Year
 - District of the Year
- **12:55 pm** **Conference Evaluation**
- **1:00 pm** **Adjourn**

Questions not answered will be responded to after the conference and posted on website

BOND OVERSIGHT DONE RIGHT

info.caboc@gmail.com ■ (510) 697-7212 ■ 121 Ash Court, Hercules, CA 94547 ■ www.BondOversight.org



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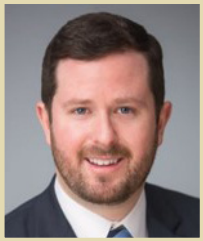
■ 10:10 am

KEYNOTE:
Moss Adams, LLP

Keynote Speakers:

- **Stephan Bacchetti**
- **Tammy Lohr**
- **Arthur Ngo**

Stephen Bacchetti,
 CPA, CIA, CCA,
 Partner, Moss Adams



Steve has more than 15 years of experience in construction advisory services and leads the firm's construction advisory

services team. He performs specialized review and advisory services for construction projects and capital improvement programs, including risk assessments; internal controls, process management and control services, project leadership, and documentation reviews; construction contract audits; and construction bond performance audits. Stephen works closely with local governments, Tribes, universities, K-12 school districts, hospitals and health care systems, and commercial real estate developers, as well as construction contractors and project managers on structures and developments that range from millions to billions of dollars. He has planned, managed, and executed engagements that have resulted in significant cost savings and control and reporting improvements for his clients.

**Bond Program Capital Program Management:
 Best Practices for Schools and Oversight Committees**

A District's Bond Program is often its largest expense, but knowing if the investment in capital assets is being efficiently and effectively managed can be difficult. Given the high value, long lifespan, and tangible nature of these capital assets, careful planning is critical for meeting the needs of the community while demonstrating compliant and prudent use of funds. We will cover key capital-planning best practices, including:

- **Comprehensive and systematic planning**
- **Procurement, contract-type strategies, and change orders**
- **Cost and budget management**

Tammy Lohr, CFE, ODCP
 Senior Manager, Moss Adams



Tammy assesses operational performance for public sector organizations including state and local government, school districts, and higher education institutions. Her engagements are informed by rigorous analysis and employee engagement to evaluate operations, which may include the efficacy of existing organizational structure and resourcing strategies, enhancing workplace culture, identification of system needs, and streamlining processes.

Tammy focuses on key elements of each engagement to develop high-quality deliverables that address client needs and meet applicable professional standards. By using a collaborative approach to working with her clients, she delivers projects and reports attuned to each client's unique operating environment with recommendations designed to optimize organizational performance.

Prior to joining Moss Adams, she worked as a performance auditor for the Washington State Auditor's Office.

Arthur Ngo, CPA
 Senior Manager, Moss Adams



Arthur Ngo has practiced public accounting since 2007. He specializes in financial statement and performance audits, single audits, internal controls evaluations, and financial reporting for a variety of clients, including not-for-profit organizations, education agencies, and higher education institutions. Arthur has performed compliance audits for not-for-profit and education entities that participate in federal programs under the Yellow Book, the OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. He's also experienced in auditing college foundations and performing state compliance audits for California Community Colleges and California education agencies.



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■ 10:55 am

The El Rancho Unified School District's Story: How One CBOC Member Made a Difference!

Carolyn Castillo

CABOC President, former El Rancho USD CBOC and former El Rancho USD School Board Member



Getting involved as a community watchdog on a CBOC changed everything. A school bond is one of community taxpayers' most

significant investments. School bond funds must be used for their intended purposes. As a CBOC member, I learned that poor management resulted in the waste of bond funds. I found problems and brought attention to change the direction of the construction program and helped to get a Fiscal Crisis and Management Assistance Team (FCMAT) fraud audit for the school district's program.

In 2017, the CBOC committee was dissolved by the school board. The following year, I campaigned; was elected and served on the School Board from 2018 until 2022. During 2017–2018 I investigated and performed analysis to conclude in 2018 that there was waste and mismanagement of ER Bond Funds. By mid-2019, a FCMAT audit was initiated and completed, fraud was found due to mismanagement and waste.

At the CABOC Annual conference I will cover details and the lessons learned that helped to get the ERUSD bond program back on the right track.

LESSONS LEARNED

- Benchmark construction cost
- Hire Facilities Manager to oversee bond projects from design, bid and construction
- Competitive bid business, professional services, contracting services over \$50,000
- Prior to awarding a contract to a new contractor, obtain a Dunn & Bradstreet report to learn about the firm's financial stability, age, number of employees and risks
- Bond construction fees should not be based on the percentage of the construction contract
- Ensure a CBOC is in place when construction starts
- Ensure the construction firm possesses the appropriate licenses such as contractors or architectural professional license.
- Be wary of contractors contributing to Political Action Committees or consultants who list PO boxes as their business address
- Ensure superintendents have strong leadership skills coupled with confidence courage to act in the best interest of their school district and community

UPWARD

ACCOUNTING - CONSULTING - WEALTH MANAGEMENT

To look forward and rise to the challenges ahead requires welcoming change with optimism. It's how we uplift educational institutions to plan for what's next—including industry-focused performance audit methods to help manage and maintain compliance with construction bond programs. Discover how our advisory solutions can help elevate your performance.

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■ 11:40 am

Ask the Experts Panel of Four veteran CBOC members with Q&A



Michael Bishop

Michael is a current member of the Long Beach USD CBOC, a retired K-12 public school administrator, and Fiscal Management Assistance Team (FCMAT) mentor and coach.

He is a retired Chief Business Official (CBO) and Owner of Michael

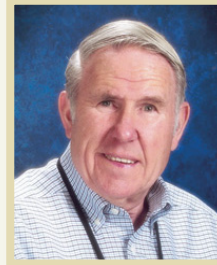
Bishop & Associates, Inc. He has consulted in K-12 District Operations, Nonprofit Organizations, Operations Management, Analytical Skills, Coaching and Tax Preparation & Planning.



Michael Frattali

Mike graduated from Reed College with a BA in Political Science. After service in the US Navy, he settled in University City neighborhood of San Diego, California. Mike has been employed by the City of San Diego since 1996 and has worked in

the Police, Water, Debt Management, and Engineering & Capital Projects Departments. He has an MBA from San Diego State University with a concentration in finance. Mike is a member of the San Diego County Taxpayers Association and serves on the San Diego Community College and San Diego Unified School District ICOCs.



Anton Jungherr

CABOC Co-Founder and Executive Director

Anton Jungherr, along with Jack Weir, is the Co-Founder of the California Association of Bond Oversight Committees (CABOC).

Anton has extensive experience in school district and city business management. He was the Chief Financial Officer for six school districts including Anchorage, AK and San Francisco, CA and two cities including Newark, NJ.

Anton is a former member of the West Contra Costa Unified School District CBOC where he served various terms for a total of ten years.

Anton is the author of Operational PPBS* for Education: A Practical Approach to Effective Decision Making, Harper & Row, New York, 1971. (*Planning, Programming, Budgeting System) He earned his Master of Education degree in Educational Administration from Columbia University, and received a Master of Public Administration degree from Syracuse University. Mr. Jungherr also holds a Bachelor of Science degree in Business Administration from the University of Connecticut.



Tom A. Rubin

CPA, CMA, CMC, CIA, CGFM, CFM. Chair of CABOC Audit Committee

- Fremont Unified School District Measure E Citizens' Bond Oversight Committee - 2014 \$650 million bond ballot issue
- Alameda County Transportation Commission Independent Watchdog Committee - \$10 billion for road and transit improvements from 2000-2055
- Consultant to Los Angeles Unified School District Bond Oversight Committee - 2001-2018 - \$27 billion new construction and modernization program
- Former CFO for two of the largest transit agencies in the U.S.
- Former Audit/Consultant Partner, Deloitte Haskins & Sells
- Five decades in government finance, planning, operations, and construction.



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■ 12:40 pm

CABOC 2023 AWARDS

■ CABOC Member of the Year

An active member committed to ensuring the independence of the bond oversight committee

Bryan Scott

Bryan serves on the Brentwood Union School District CBOC. He helped the committee and district staff understand all appropriate state bond oversight laws and procedures. He was successful in turning the district around from its previous non-compliant ways. Bryan also wrote a comprehensive guide to Proposition 39 bond oversight for new CBOC members.

■ District of the Year

An open transparent district that has provided support and documentation for its independent bond oversight committee to perform its duties excellently

Moraga School District

Moraga SD is a small school district that has successfully managed its bond program despite COVID-related challenges. It has supported the concept and the actions of its CBOC in a manner that enhanced the value of taxpayer funding.

■ CABOC Person of the Year

A person who has contributed to independent bond oversight

Lope Yap, Jr.

Lope produced six training videos for CABOC. He is the President of Lopevision, Inc. Lope has 39 years of experience in the motion picture industry. He is associated with numerous projects including: The Hunt for Red October, Titanic, Innerspace and Rumor Has It. As a producer, production manager, and 1st assistant director, he has worked on over 1,000 national/international commercials.

CABOC MISSION

CABOC is the trusted and independent source of information, education, training, and assistance on school bond oversight to CBOC members and California taxpayers. Proposition 39 (2000) lowered the threshold for local voter approval of school bond measures to 55%. It was accompanied by the mandate to establish independent CBOCs to oversee school bond expenditures and report findings to governing boards, taxpayers, and the general public.

Our mission is to develop the tools: training materials, newsletters, workshops, and conferences to enable CBOC members to engage in rigorous independent oversight and fulfill their obligations to ensure and report that bond money has been spent adequately for the benefit of students, families, their communities and all Californians and to represent our collective interests at the statewide level."



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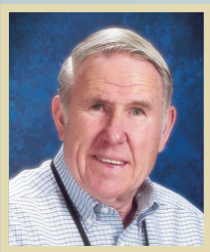
CABOC BOARD OF DIRECTORS • CABOC OFFICERS



Carolyn Castillo
CABOC President

Carolyn is President of the CABOC Board of Directors. Previously, Carolyn served on the El Rancho Unified School District Board where she promoted facilities practices to support bond projects. Carolyn is a published author of peer reviewed papers relating to Business Continuity. In addition, she was a contributing author for the Facilities Design and Management Handbook published by McGraw-Hill. Ms. Castillo served on the editorial board of the Journal of Business Continuity & Emergency Management from 2007 through 2011.

Ms. Castillo holds a Master of Management from the University of Redlands, a Bachelor of Science in Industrial Technology and Bachelor of Arts, Psychology from California State University Long Beach. In addition, Ms. Castillo is a member of the International Facilities Management Association where she was a speaker at its World Workplace Conference in 2003.



Anton Jungherr
Co-Founder & Executive Director

Anton serves as the Secretary and Treasurer of CABOC. Anton is a member of the committees for FAQ, best practices, conference, legislation, operations, and executive. He has extensive experience in school district and city management. He served as a member of the West Contra Costa Unified School District CBOC for a total of ten years. Mr. Jungherr was the Chief Financial Officer for six school districts including Anchorage, AK and San Francisco, CA and two cities including Newark, NJ. He is the author of *Operational PPBS* for Education: A Practical Approach to Effective Decision Making*, Harper & Row, New York, 1971. (*Planning, Programming, Budgeting System)



Jason Hunter
CABOC Assistant Treasurer

Jason is the Co-Chairperson of the Legislation Committee. He has served as both a member of the Riverside Unified School District's CBOC and as past chair of the Riverside Community College District's CBOC. He is well-recognized locally as an ardent government watchdog, advocate for taxpayer, ratepayer, and fee-payer interests, and community activist.

After two decades working in the private and public sectors for the engineering and utility industries and overseeing multiple billion-dollar budgets, Hunter is now owner of a management consulting company specializing in energy, finance, and government operations.

BOARD OF DIRECTORS



Tahir Ahad, MBA, CPA
CABOC Director

Tahir is the CEO/President of the school consulting firm, Total School Solutions (TSS). He continues to be involved in providing services to TSS clients; primarily in the areas of facilities programs efficiency studies, performance audits and evaluations, systems improvement, and developing and implementing best educational management practices.

Tahir has had a long career in public education, serving as assistant and deputy superintendent in five school districts. He had the opportunity to manage and implement facilities programs in each of these districts. Since 1999, Tahir has been the CEO of TSS and has been involved with dozens of school districts in his management consulting role, mostly with the school facilities planning and construction projects. Tahir has been involved in improving and strengthening oversight of the facilities programs since the passage of the Proposition 39 (2000), both as performance auditor and advisor/consultant.

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Marc Carrel
CABOC Director

Marc Carrel is a nonprofit executive and attorney. He serves as the President and Chief Executive Officer of Breathe Southern California, which focuses on education, advocacy, and research to reduce air pollution and

improve lung health, and the Emphysema Foundation of America, which provides advocacy, education, research and patient support for those with emphysema and chronic obstructive pulmonary disease (COPD).

He provides strategic direction and manages the day-to-day operations for both organizations. In October 2021, he was appointed by the Beverly Hills Unified School District Board of Education to their Citizens' Bond Oversight Committee. The Committee is tasked with overseeing bond proceeds, expenditures, and audits to repair, retrofit, upgrade and replace equipment, classrooms, and facilities in the district's schools. The bonds were approved by the voters of Beverly Hills under Measure E (\$334 million bond measure approved in November 2008) and Measure BH (\$385 million bond measure approved in June 2018).



Marcus Crawley
CABOC Director

Marcus recently retired from his California General Contractor business after 50 years of experience in all phases of the building trades. The complications of construction performance and collec-

tions provided grounding in 'do-it-yourself' actions. Marcus plans to bring this 'Can-Do' attitude to all his civic responsibilities.

As President of the Alameda County Taxpayers Association, Mr. Crawley serves on the Citizens Bond Oversight Committee at Peralta Community College and the Alameda County Budget Oversight Committee.

The cities, schools and agencies have developed a wide array of strategies to undermine accountability.

Marcus is dedicated to ensuring that voters are well informed before tax measure elections and that after the election the tax expenditures comply with the will of the voters. Marcus holds a Bachelor of Science in Mathematics from the University of Nebraska.



Michael Frattali
CABOC Director

Mike graduated from Reed College with a BA in Political Science. After service in the US Navy, he settled in University City neighborhood of San Diego, California. Mike has been employed by the

City of San Diego since 1996 and has worked in the Police, Water, Debt Management, and Engineering & Capital Projects Departments. He has an MBA from San Diego State University with a concentration in finance. Mike is a member of the San Diego County Taxpayers Association and serves on the San Diego Community College and San Diego Unified School District ICOCs.



Chris Hanson
CABOC Director

Chris Hanson is a Director with the California Association of Bond Oversight Committees and is a member of the Training Materials Committee. Chris has served as an

At Large Member of City College of San Francisco Bond Oversight Committee as well as serving on the Report Sub Committee; Public Comment Little Hoover Report 2017. Chris' career ranges from an Equine Body Worker, Therapeutic Riding Horse Handler, negotiator representing Skyline Stables opposite San Francisco Public Utilities Commission (SFPUC) and creator of a Community Outreach Program for new horse stables. Additionally, Chris served as a Production Assistant at Global Business Network, a scenario planning consultant firm and network.

Continued



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BOARD OF DIRECTORS

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Gina Haynes
CABOC Director

Gina is a licensed civil engineer with over 25 years' experience. She works in the public sector managing multimillion dollar projects.

For over twenty years she has worked for the City of Pittsburg as a Senior Civil Engineer/Associate Engineer (Capital Improvement Division). She manages the Capital Improvement Section of the Public Works Department, Engineering Division.

Gina was awarded the CABOC's Outstanding CBOC Member Award in 2021. She is a member of Mt. Diablo USD CBOC. School bond oversight and the accountability of school bond proceeds have been advanced by her persistence.



Manuel Jimenez
CABOC Director

Manuel Jimenez has spent his career in construction starting as a carpenter, owning/operating a residential general contracting business and eventually working

in commercial construction building public schools. His commercial construction experience has been on the project management and estimating side. Recently Manuel has moved to the renewable energy sector and works in estimating grid scale solar fields.

Manuel is a father to a 12 year old boy who attends 6th grade in the Sacramento Unified School District. During Covid-19 closures he was frustrated with the decisions his school board was making and became involved in attending board meetings. This led to volunteering for the Measure H CBOC. With his construction background and a keen interest in fairness and transparency, Manuel has the experience to understand and provide oversight to bond spending.



Lucille Lyon, BA, MPA
CABOC Director

Lucille Lyon has been a County Public Guardian for 40 years, serving the counties of Orange, Riverside, Los Angeles, and Santa Clara in different capacities.

County Public Guardians are court appointed fiduciaries who serve the severely mentally ill and older audits. She is a life member of the California Association of Public Administrators, Public Guardians and Public Conservator. She is also a member of the National Guardianship Association currently serving on the Education, State Affiliates and Public Guardian Committees. Her special knowledge and skills will assist individuals who have taken their time to work on CBOCs.

Lucille has a BA from the University of Southern California and a MPA from California State University San Bernardino.



Jonathon Reynolds, JD
CABOC Director

After graduating from law school at the University of South Carolina with honors, Jonathon relocated to the Central Coast of California to begin his professional career.

Jonathon served as an Academic Mastery Program Consultant for the Pepperdine University Caruso School of Law where he provided instruction to recent graduates preparing for the bar exam and provided academic support to one of the school's Dean, and he has worked in various law firms. Jonathon was unanimously appointed by the Grover Beach City Council to the Citizen's Oversight Committee for Tax Revenue Measures, and he was then unanimously elected by his colleagues to be the chair of the Committee. Jonathon served as the chair for two cycles before then serving as vice chair. Jonathon was subsequently appointed to the CABOC Board of Directors. Jonathon is dedicated to public service and was previously recognized by the City of Nashville, TN for his acts of service to the community. *Continued*



BOARD OF DIRECTORS

CONTINUED



Ourania Riddle, CABOC Director

Ourania an advocate for open government was named the "2015 Tax-Fighter of the Year" by the Howard Jarvis Taxpayers Association. She authored the Measure N, the Dixon Open Governance Act, which was placed on the November 2012 ballot which ultimately failed due to misrepresentation from its opponents. Ourania served on the Solano County Jury, She served on the Board of Directors of the California Grand Jurors Association, was a trainer for the state-wide county Grand Juries. She was also the Editor of the Grand Jurors' Journal.

In 1993, Ourania along with others started a newspaper, the Dixon Independent Voice (IV). As a reporter, she wrote unbiased, informative news for the citizens of Dixon. Ourania is a member and volunteered for Californians Aware, a government watchdog that helps reporters and citizens understand their rights, in order to hold government accountable, open and transparent. Currently, Ourania is the secretary of the Solano County Taxpayers Association.



Tom A. Rubin
CPA, CMA, CMC, CIA, CGFM, CFM.
Chair of CABOC Audit Committee

- Fremont Unified School District Measure E Citizens' Bond Oversight Committee - 2014 \$650 million bond ballot issue
- Alameda County Transportation Commission Independent Watchdog Committee - \$10 billion for road and transit improvements from 2000-2055
- Consultant to Los Angeles Unified School District Bond Oversight Committee - 2001-2018 - \$27 billion new construction and modernization program
- Former CFO for two of the largest transit agencies in the U.S.
- Former Audit/Consultant Partner, Deloitte Haskins & Sells
- Five decades in government finance, planning, operations, and construction.



Laura Santos, CABOC Director

Laura attended school in Bassett USD and then earned a degree in Political Science from UCLA and a JD from UC Davis. After practicing law for ten years, she began a career in public relations, media, and promotions. She has decades of experience in community engagement and organizing. Much of her career has been spent in disadvantaged communities addressing equity and justice issues in education, health, water, and the environment.

She sat on the Bassett USD CBOC before being elected to the Bassett USD board in 2007. She also served on the La Puente Valley ROP board, and in 2013 she was elected to the Mt San Antonio College, which has a billion-dollar construction program. ■

CABOC FOCUS

The implementation of these three Little Hoover Commission* recommendations will guide the focus and work of CABOC:

- "Develop easy-to-access online training materials for members of Citizens' Bond Oversight Committees."
- "The Governor and Legislature should update and overhaul the education code related to the Strict Accountability in Local School Construction Bonds Act of 2000."
- "Impose sanctions for school and community college districts that fail to adhere to constitutional and statutory requirements of Proposition 39, including preventing the district from adopting future bond measures under reduced voter threshold."

* **The Little Hoover Commission (LHC)** is a bipartisan, independent California oversight agency to promote the economy and efficiency in state and local government. In their Report #236, February 2017, LHC made recommendations to the Governor and the Legislature regarding School Proposition 39 bonds.



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CABOC ADVISORS



Judith Box

Judith's career spans over 25 years as an educator, progressing from Teacher to District Director of Human Resources, while serving school districts in Alameda and Santa Clara Counties. She represents the Contra Costa Tax Payers' Association as a member of the Walnut Creek Bond Oversight Committee.

She has been active in her community by serving on Homeowner Association boards, is an active member of the UC Alumni Association, and has served as Treasurer on two clubs in Rossmore. For nineteen years, Judith volunteered for the AARP Tax-Aide program, where she taught other volunteers, managed tax preparation sites, and prepared tax returns, a free program for citizens

Judith holds a Bachelor of Arts, University of California Berkeley; Master in Science – Teaching Mathematics, University of Santa Clara; and a Doctorate in Education, UC Berkeley.



Lori Chinn

Lori is retired from Berkeley USD. She served as Manager of Bilingual Education at Berkeley USD, Bilingual Program Specialist at the Oakland USD, Director for the National Desegregation Assistance Center and Chancellor of the National Hispanic University, Bilingual Education Director of the Asian Resource Center, Chicago Board of Education and Bilingual Education Specialist at the Illinois Office of

Education. Planned and conducted staff development and training for kindergarten to 12th grade administrators, teachers, instructional assistants and parents. Covered State and Federal compliance. Curriculum included English as a Second Language, Bilingual Education, math and science. Volunteered at community groups, non-profit organizations and fundraisers. Developed and produced a training video on the role and responsibilities of CBOC members and Proposition 39. Helped design data bases and performance audit surveys.

Lori has a Master of Science in Education degree in Administration and Supervision, National College of Education, California Administrative Services credential, Bilingual certificate of Competency in Chinese and a California Life Elementary Teaching Credential.

Christine Coradaro

Christine has experience in both for-profit and non-profit sectors including 25 years in venture capital investing as a General Partner and in the biotechnology sector as a scientist and business development professional. Since retiring from the for-profit sector she has devoted over 10 years to teaching ESL/Life Skills/ Citizenship/Community Engagement to low literacy adult immigrants through a program she created in partnership with Chinatown Community Development Center in San Francisco. She is involved in civic initiatives to change the SFUSD Board of Education governance structure, supporting the newly formed CBOC through data analysis and research and involvement with the Literacy Committee to change the reading curriculum and improve student outcomes.



Andrea Dawson

Andrea has been a member of Oakland USD CBOC for over 10 years. She is the current the Chair of the CBOC for

the \$475 million Measure J Bond and the \$312 million Measure B Capital Improvements Program. She is also the Chair of the Peralta Colleges Measure G Bond Program.

Andrea has worked in California public school construction the past 25 years, in several roles including construction management, bond program and project management. For the past thirteen (13) years she has worked as a senior project manager on the San Francisco USD billion dollar Measure A 2011/2016 Bond Program.

Andrea is a resident of Oakland whose daughter graduated from Oakland public schools. In addition to being on the CBOC for the past 25 years she has volunteered in Oakland Schools in many capacities; including School Site Council, PTA President, Budget and Finance Committee volunteer and more.

Andrea holds a marketing and design degree from Bassist College in Portland Oregon.



Sallie DeWitt

Sallie attended public schools in the Bay Area and then received two degrees from UC Berkeley, a BA in History and

an MBA. She and her husband, Jim DeWitt, have lived in Richmond since 1975. Their children and grandchildren attended WCCUSD schools, and, now,

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Sally DeWitt Continued

two great grandchildren are at Washington Elementary School. In the 1990s, Sallie co-founded a community group called "The Many Hands Project" at Washington School.

During this time, she also served on the Board of the West Contra Costa Ed Fund. Starting in 1995, she worked at Chevron as a budget analyst and an Education Outreach Coordinator.

Sallie retired in 2015, and two years later joined WCCUSD's CBOC, wanting to put her experience in business planning, budgeting and variance analysis to work overseeing WCCUSD's bond program. Her second term on the CBOC began in January, 2019. During her time the CBOC, she has been active on the Audit and Annual Report Subcommittees. She is motivated to ensure all public-school students have an opportunity to achieve their full potential.

Alison B. Henry

Alison is an investment manager at Violich Capital Management which is a Registered Investment Advisor with the Securities and Exchange Commission that focuses on serving individual and institutional investors and is based in San Francisco, California. She volunteers in activities with education at Colorado College as "City Champion" for San Francisco and reports directly to President and Board of Trustees. Also volunteer for Vida Verde on fundraisers to provide of free education for inner city/underprivileged children in the San Francisco area.



Vanessa Hill

Vanessa attended public schools in Oregon and California before attending Pepperdine University for her undergraduate degree in accounting and University of San Francisco for her MBA with an emphasis in finance.

Vanessa is a certified public accountant and co-founder of Evidentia Consulting, LLP, a forensic accounting and consulting firm with offices in Berkeley and Redwood City.

Her work includes serving as an expert witness on accounting and economic damage issues for business disputes as well as providing economic loss analysis for individuals in wrongful termination, personal injury, and wrongful death litigation.

Vanessa has served in a variety of leadership and governance roles in both her professional and civic community. A strong supporter of public education, Vanessa was a member of the West Contra Costa Unified School District's Citizens Bond Oversight Committee from July 2018 through July 2020.

She has lived in El Cerrito with her husband since 1999 and her two sons have attended local public schools.



Lorraine Humes

Lorraine Humes is a member of the West Contra Costa County Taxpayers' Association. She has been a resident of San Pablo for approximately 40 years. She retired after working 29 years as a food microbiologist from the U.S. Department of Food and Drug. Lorraine has no children but knows the value to society in having every child get a good educa-

tion. She is also a tax payer and want to provide our children with a safe and interesting learning environment at a reasonable price to me.

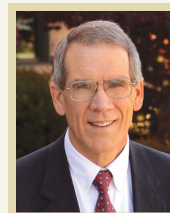
Lorraine got interested in the CBOC when last school construction bond was trying to be passed and when she heard that there was a committee vacancy. She asked to be the Taxpayers Association representative on the committee. She has represented the West Contra Costa County Taxpayers Association on the West Contra Costa Unified School District CBOC since March 6, 2019.



Keith Mueller

Keith is a professor of engineering with three engineering degrees and an MBA from UC Davis. The courses he teaches

include HVAC, electronics, general engineering, materials science, alternative energy technologies, and engineering plumbing. Previously, he worked as an engineer and program manager in the telecommunications industry. He holds a patent on a tunable high frequency oscillators. Before that, he designed robotic highway maintenance vehicles. Aside from his professional experience, he has served as treasurer for many years and for many school boards.



Tom Panas

Tom is an El Cerrito Resident, 2015-2016 Chairperson of the WCCUSD CBOC and was chair of the CBOC Audit Subcommittee and Reports Subcommittee. Tom has extensive experience with bonds and finance. He has a BS in

Continued



CALIFORNIA ASSOCIATION OF BOND OVERSIGHT COMMITTEES

INDEPENDENT CITIZENS' OVERSIGHT COMMITTEES

SATURDAY, OCTOBER 14, 2023

CABOC ADVISORS CONTINUED

Computer Science from Cal Poly and an MBA in Finance from UC Berkeley. Tom was awarded his CPA certificate in 1980 and has been the CFO at two software companies. In the community, he is the treasurer and a board member of the Richmond Emergency Food Pantry, the El Cerrito Historical Society, and the Friends of the El Cerrito Library.

Tom also serves on the Board of the El Cerrito Library Foundation. He has lived in West County since 1975 and was added to the El Cerrito Wall of Fame in 2014. Tom served on the WC-CUSD School Board 2016-2020.



Barbara Pisching

Barbara, a resident of Suisun City in Solano County, has been actively serving on the Fairfield-Suisun USD Measure J CBOC

since the bond passed in 2016. She is the taxpayer organization representative on the committee from the Central Solano Citizens' Taxpayer Group. She wrote the CBOC's first annual report, and now edits the report annually. Barbara routinely writes an editorial in the local Fairfield newspaper about the status of the school bond projects and finances, identifying any questionable project spending practices.

In March 2019, she was appointed to and still serves as Vice-Chair on the Suisun City General Transaction and Use Tax Oversight Committee, which oversees the usage of a special sales tax with restricted purposes. She attends City Council meetings, representing the committee as well as the public interest.

Barbara had a multi-phase career in computer systems implementation and

taught classes on systems analysis and design at UC Berkeley Extension. She compiled a course materials workbook for her classes for use in determining solutions to real business needs. She has an MBA in International Management from Golden Gate University, and a California Community Colleges Instructor Credential in the subject matter areas of business and industrial management. She has a background in residential construction, with an associate degree in Construction Management. Barbara founded a remodeling project management consulting service that advised homeowners in construction methods, materials purchasing, and universal design concepts. For two years she volunteered as an adult literacy tutor for the Solano County Library Literacy Program.



Rex Ridgeway

Rex is the former Interim Chair of the San Francisco USD CBOC. In May 2021 Rex served as Vice Chair and Interim

Chair to a new CBOC. He provided leadership to challenge illegal bond expenditures, changed the process for appointing CBOC members, drafted bylaws to make the CBOC independent, submitted the first annual report since 2019, reviewed prior audits for fiscal years 2020 and 2021. *See complete bio on page 12.*



Amadeo Rodriguez

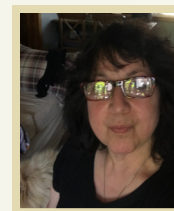
Former CABOC President

Amadeo Rodriguez, a decorated U.S. Marine and father to three

students from Bassett USD. His strong public service background as a Marine and federal employee, and hands-on experience with educational programs make him an ideal CABOC advisor.

Amadeo enlisted in the United States Marines Corp in September, 2002, he deployed to Fallujah, Iraq in 2005, and was Honorably Discharged in September, 2009. After serving our country as a Marine, Amadeo became a security contractor with the Federal Protective Services. In 2010, he was recruited by the Social Security Administration to serve as a Claims Representative. He attended DeVry University and the University of Phoenix.

Amadeo has been a resident of the city of La Puente for over 10 years. He has been an active community member with Bassett USD as a volunteer parent with Child development, Cheer and Band member supporter with their fundraising committee and also part of the Bassett USD CBOC.



Linda Ruiz-Lozito

Linda served as the Taxpayer Representative on the Citizens' Bond Oversight Committee, for the West Contra Costa Unified

School District (WCCUSD). She was the Board Chair of a charter middle school during major transitions including the successful renewal of the charter. Linda was a plaintiff in a Voting Rights Act (VRA) lawsuit against the WCCUSD with a settlement agreement that in 2020 they would finally follow the VRA after about a year of stalling. Her longtime profession is as a freelance graphic artist and artist. www.WildcatArts.com.

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CALIFORNIA ASSOCIATION OF BOND OVERSIGHT COMMITTEES
INDEPENDENT CITIZENS' OVERSIGHT COMMITTEES
SATURDAY, OCTOBER 14, 2023

CABOC ADVISORS
CONTINUED



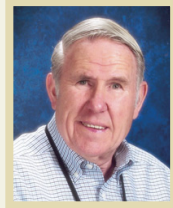
Ben Steinberg

Ben is a senior executive with extensive nonprofit management experience in community development, education, and finance. When Ben's daughter began kindergarten, Ben focused on local public education issues, including wasteful practices in the local school district's bond-funded school construction program. Ben was one of a team of local education advocates who drew attention to this issue. Eventually, the community's efforts led to a district-approved forensic audit of the construction program. After the construction manager refused to open its books for the forensic audit and the school district and Board of Trustees refused to force compliance, the forensic audit was never fully completed. Community parents did not have the financial resources to hire an attorney to force the construction manager to open its books. ■

CONFERENCE
COMMITTEE

- Carolyn Castillo**
- Anton Jungherr**
- Keith Mueller**
- Tom Rubin**
- Linda Ruiz-Lozito**
- Denise Sheehan**

CABOC STAFF



EXECUTIVE
DIRECTOR

Anton Jungherr

Along with Jack Weir, Anton co-founded CABOC in Sept. 2019. Anton receives an \$100 per month stipend which he contributes directly back to CABOC. *See page 4 & 6 for more complete bios.*



GENERAL
COUNSEL

Susan Lustig, Esq.

Susan has been a licensed attorney in California for more than 25 years. She practices family law in San Luis Obispo and Santa Barbara Counties.

For 12 years, Ms. Lustig served as the Administrative Director of the Conference of Western Attorneys General (CWAG) Alliance Partnership, which builds relationships between U.S. and Mexican Attorneys General's Office, and provides training programs in support of criminal justice system reforms and Rule of Law efforts in Mexico.

Ms. Lustig oversaw the development, planning and implementation of training programs for Mexican criminal justice professionals, including prosecutors, investigators and forensic scientists, in support of Mexican criminal justice system reforms. She received a Diploma of Specialization in Criminal Law at the XXXIV Courses in Legal Specialization from the University of Salamanca [Spain] in 2014, and an LLM in Trial Litigation, in Spanish, from California Western School of Law in San Diego in 2019, magna cum laude. *CABOC Pays \$1 per year for retainer.*



ADMINISTRATION
MANAGER

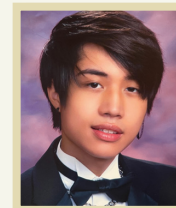
Denise Sheehan

Denise provides administrative support to CABOC. She is the former Business Manager of Contra Costa Taxpayers Association. She is the owner of two small businesses including "A Graceful Stitch" that designs, produces, and distributes quilt patterns and fabric lines. Denise is the author of two quilting how-to books that are sold through quilt stores and Amazon. She teaches quilting classes at local stores and throughout the country. Denise has two adult daughters. In her previous life before children, she worked for the Piedmont Unified School District.

GRAPHICS MISTRESS

Linda Ruiz-Lozito

See page 12 for bio.



DATABASE
MANAGER

Dominic Recto

Dominic helps maintain the database for CABOC. He is a student in Diablo Valley Community College. He plans to transfer to UC Davis and major in computer engineering. He has a passion for programming and design, having been an important member of his high school robotics club at Hercules High and taking programming classes at DVC, as well as having experience as a paid graphic design intern at Kennedy High. He was also the section leader for the Bass section in his high school's orchestra, having played the instrument since middle school. ■