

ACHIEVING DISTRICT GOALS... TOGETHER.



CSDA's 2018
Special District
Leadership Academy Conference

A Comprehensive Governance Leadership Conference for Elected and Appointed Directors/Trustees.



why Attend

Participate in the **Special District Leadership Academy Conference** and complete all four modules of the Academy during the course of two and a half days.

This conference content is based on CSDA's Special District Leadership Academy (SDLA) groundbreaking, curriculum-based continuing education program, which recognizes the necessity for the board and general manager to work closely toward a common goal. SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members.

Local boards are the reason why local control is local. Special district boards are the voices of the community and they are also a large reason why special districts exist.

The truth is that every elected or appointed public official needs to worry about governance; governance is what boards do. It's what they bring to the table.



Three locations throughout the state.



Early bird discount!



SDLA Conference is presented by CSDA and co-sponsored by SDRMA.



**February 4 – 7, 2018
Embassy Suites La Quinta**

55-777 Santa Rosa Plaza
La Quinta, CA 92253

ROOM RESERVATIONS

Room reservations are available at CSDA rate of \$169 plus tax, single or double occupancy by calling 760-777-1711 and using the group code CSD. This location also offers complimentary self-parking. The room reservation cut-off is January 14, 2018, however, space is limited and may sell out before this date.



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Friday, January 5, 2018.

*Cancellations must be in writing and received by CSDA no later than January 22, 2018 at 5:00 p.m. Substitutions are acceptable and must be done in writing no later than February 1, 2018 at 5:00 p.m.**



**April 15 – 18, 2018
Embassy Suites Monterey – Seaside**

1441 Canyon Del Rey
Seaside, CA 93955

ROOM RESERVATIONS

Room reservations are available at CSDA rate of \$169 plus tax, single or double occupancy by calling 1-800-EMBASSY and using the group code CS8. The room reservation cut-off is March 16, 2018, however, space is limited and may sell out before this date.



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Friday, March 16, 2018.

*Cancellations must be in writing and received by CSDA no later than April 3, 2018 at 5:00 p.m. Substitutions are acceptable and must be done in writing no later than April 12, 2018 at 5:00 p.m.**



**July 8 – 11, 2018
Embassy Suites Napa Valley**

1075 California Blvd.
Napa, CA 94559

ROOM RESERVATIONS

Room reservations are available at CSDA rate of \$184 plus tax, single or double occupancy by calling 1-800-HILTONS and using the group code CPD. The room reservation cut-off is June 8, 2018, however, space is limited and may sell out before this date.



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Friday, June 8, 2018.

*Cancellations must be in writing and received by CSDA no later than June 25, 2018 at 5:00 p.m. Substitutions are acceptable and must be done in writing no later than July 5, 2018 at 5:00 p.m.**



Returning Attendee track only at this location!



SDRMA Credit Incentive Points

Special District Risk Management Authority (SDRMA) is committed to establishing a strategic partnership with our members to provide maximum protection, help control losses and positively impact the overall cost of property/liability and workers' compensation coverage through the Credit Incentive Program. Credit incentive points can be earned based on an agency's attendance at the Special District Leadership Academy Conference reducing SDRMA member's annual contribution amount.

***Important Cancellation Information**

All cancellations received by the date indicated for that particular conference and location will be refunded less a \$75 cancellation fee. There will be no refunds or cancellations made after the date as specified per location. Please submit any cancellation notice or substitution requests to meganh@cgsda.net or fax to 916-520-2465.



FIRST TIME ATTENDEE SCHEDULE - Available at all three locations.

Sunday

5:30 – 7:00 p.m.

REGISTRATION AND NETWORKING RECEPTION

Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.



Monday

8:30 a.m. – 12:30 p.m.

(Break from 10:00 - 10:30 a.m.)

BUILDING A FOUNDATION FOR GOOD GOVERNANCE

This session covers Module 1 of the SDLA: Governance Foundations.

In this informational session, the instructor will lay the ground work for good governance in your district.

Attendees will discover:

- Why good governance is so important to the overall well-being of the district.
- The traits of effective board members.
- What good governance means and how to effectively put it into practice.
- How to move your board from “I” to “we,” including how to become an effective team, establish team standards, and essential conditions for team building.

12:30 – 1:30 p.m.

LUNCH PROVIDED *(all attendees)*

1:45 – 4:30 p.m.

(Break from 3:00 - 3:30 p.m.)

FULFILLING YOUR DISTRICT’S MISSION: CHARTING THE COURSE

This session covers Module 2 of the

SDLA: Setting Direction/Community Leadership.

This session will highlight the importance of setting the direction for your district. Learn the critical components of direction setting for your district along with how to avoid planning pitfalls. Attendees will walk through the steps of establishing and fulfilling your district’s mission, vision, values and strategic goals and how to communicate those objectives to your constituents.



5:30 – 7:00 p.m.

SIP AND SAVOR EVENING RECEPTION



Sponsored by the Special District Risk Management Authority (SDRMA)

Join us for an evening of networking and refreshments.

Tuesday

8:30 a.m. – 12:00 p.m.

(Break from 10:00 - 10:30 a.m.)

DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS

This session covers Module 4 of the

SDLA: Board’s Role in Human Resources

This conference session will teach participants how to determine the Human Resource health of their district and what areas to focus on as a board and individual governing official including:

- Identifying the board’s role in human resources.
- Recognizing HR red flags and positive indicators.
- Developing and maintaining essential HR policies.
- Covering confidentiality and legal liabilities.
- Evaluating the general manager.

12:00 – 1:00 p.m.

LUNCH PROVIDED *(all attendees)*

1:15 – 4:00 p.m.

(Break from 2:45 - 3:00 p.m.)

GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH

This session covers Module 2 of the

SDLA: Setting Direction/Community Leadership.

This session looks at common communication breakdowns and areas for improvement in public agency communications. It will discuss proper and effective communication methods to be aware of as a governing official including:

- Identifying audiences.
- Responding to public input.
- Media relations.
- Legislative outreach and advocacy.

OPEN EVENING

Wednesday

8:30 a.m. – 12:00 p.m.

(Break from 10:00 - 10:15 a.m.)

SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES?

This session covers Module 3 of the SDLA: Board’s Role in Finance and Fiscal Accountability.

This session will provide a review and insight of important financial concepts, reports, and policies specific to public agencies including special districts. Attendees will learn:

- How to ask the right questions.
- How to link the finance process to the district mission and goals.
- Budget process, budget assessment, and communicating budget information to the public.
- How to develop and analyze capital improvement plans and reserve guidelines.

12:00 – 12:30 p.m.

GRADUATION CERTIFICATE DISTRIBUTION

First Time Attendees must attend all sessions in order to receive their certificate at the conclusion of the conference.



Don't miss the Sip and Savor evening reception on Monday night. Sponsored by SDRMA.



Two evening receptions are offered as great networking opportunities.

“The workshop on Setting Direction/Community Leadership was outstanding. The Leadership Academy should be a requirement for all new board members.”

– Dave Kulchin, Board Member, Leucadia Wastewater District

you'll **Learn**



WORKING AS A TEAM: THE ROLES OF THE BOARD AND STAFF IN YOUR DISTRICT.

ATTRIBUTES AND CHARACTERISTICS OF HIGHLY EFFECTIVE BOARDS.

HOW CULTURE, NORMS, VALUES, AND OPERATING STYLES INFLUENCE THE DISTRICT.

SPECIFIC JOBS THAT THE BOARD MUST PERFORM.

HOW INDIVIDUAL VALUES, SKILLS, AND KNOWLEDGE HELP TO SHAPE HOW EFFECTIVE BOARDS OPERATE.

THE IMPORTANCE OF MOVING FROM “I” TO “WE” AS THE GOVERNANCE TEAM.

THE BOARD’S ROLE IN SETTING DIRECTION FOR THE DISTRICT.

THE BOARD’S ROLE IN FINANCE AND FISCAL ACCOUNTABILITY.

AND MUCH MORE!





Sunday - April 15, 2018

5:30 – 7:00 p.m.

REGISTRATION AND NETWORKING RECEPTION

Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.



Monday - April 16, 2018

8:30 – 10:00 a.m.

THE INTRICACIES OF RUNNING A PUBLIC MEETING: DEEP DIVE INTO THE BROWN ACT

Anne Collins, Lozano Smith

Conducting the district’s business in public can be convoluted and tricky. It requires district staff, general managers, and board members to strictly adhere to ever-changing laws, impacting meetings, communications, timelines and use of technology. This workshop will use entertaining hypotheticals to engage participants, letting them dive deep into the Brown Act – all designed to help attendees stay in compliance and effectively run board meetings. Newly elected and experienced board members alike will be equipped with the tools needed to avoid falling into Brown Act traps. Key focus areas: closed sessions, public comments, serial meetings, agendas, voting and quorums, e-communications, and public records.

10:00 – 10:30 a.m.

BREAK (all attendees)

10:30 a.m. – 12:30 p.m.

HARASSMENT PREVENTION FOR BOARD MEMBERS

Kelly Trainer and Traci Park, Burke, Williams & Sorensen, LLP

AB 1661 makes sexual harassment prevention training mandatory for officials receiving any compensation. This legislation requires employers to ensure that all officials receive at least two hours of sexual harassment prevention training every two years. Receive your AB 1661 compliance training for special districts with this breakout.

12:30 – 1:30 p.m.

LUNCH PROVIDED (all attendees)

1:45 – 3:00 p.m.

HOW YOUR BOARD CAN SET CLEAR DIRECTION AND BUILD YOUR DISTRICT’S FUTURE AROUND ITS CORE PRIORITIES

Martin Rauch, Rauch Communication Consultants

Whether you call it identifying priorities, building consensus or strategic planning, every board should map out clear direction around the district’s core priorities. Setting direction and clear priorities is a core board responsibility that will guide your district to resolve key challenges and take advantage of important opportunities. This session will provide examples and tips on how the best districts develop and implement core priorities. There will be opportunities for questions, answers and engagement among the participants and the seminar leader.

3:00 – 3:30 p.m.

BREAK (all attendees)

3:30 – 4:30 p.m.

GOVERNANCE BEST PRACTICES

Dennis Timoney, Special District Risk Management Authority (SDRMA)

This session will discuss the board’s role in the governance of a special district. Using California Community Services District Law as a template we will examine the “duties” of the board and provide a job description. Samples of various public agency board member manuals will be presented to discuss how the issues and responsibilities of governance and operations are defined. The presenter will also examine Brown Act and ethics related issues that have been identified in various Grand Jury reports recently released to the public.



5:30 – 7:00 p.m.

SIP AND SAVOR EVENING RECEPTION

Sponsored by the Special District Risk Management Authority (SDRMA)

Join us for an evening of networking and refreshments.





Tuesday - April 17, 2018

8:30 – 10:00 a.m.

SAY WHAT?!? SPEAKING PLAINLY THROUGH POLICY

Brent Ives, BHI Management Consulting

This session outlines the critical nature and importance of making long-lasting and meaningful policy as a board. Good policy is the most professional expression of a great board and agency. Yet special districts struggle with what policy means and how to make and use them. Brent Ives, recognized organizational consultant to special districts in California on policy and planning, will bring his years of experience as a consultant and his long tenure as Mayor and Council member of the City of Tracy to this critically important topic. In Brent's words, "Making good policy moves our board to the highest level of performance"

10:00 – 10:30 a.m.

BREAK (all attendees)

10:30 a.m. – 12:00 p.m.

CONDUCTING EFFECTIVE GENERAL MANAGER EVALUATIONS: KEYS TO SUCCESS

Richard Pio Roda, Meyers Nave

The general manager's performance is critical to the success of every special district. The selection, development, and retention of the right GM charged with leading the organization toward its strategic goals is of primary importance to the board. Every governing body has among its primary responsibilities a thorough and professional evaluation of its GM through the use of effective tools that enable honest feedback and incorporate performance objectives and measures. The performance review process can be most effective when it goes beyond measuring performance and incorporates goal-setting, sets expectations, provides for open dialogue, and has in place defined accountability standards. This session will give participants the tools to conduct effective general manager evaluations that will help ensure that both the board and the GM are aligned on the direction and goals of their organization.

12:00 – 1:00 p.m.

LUNCH PROVIDED (all attendees)

1:15 – 2:45 p.m.

LEVERAGING YOUR STATE AND FEDERAL RELATIONSHIPS

Christopher Townsend, Townsend Public Affairs

The course will provide members with an overview on how to best leverage federal and state advocacy trips to Washington, DC and Sacramento. The focus will be on proper preparation, building and maintaining relationships, creation of advocacy materials and leveraging follow up from the advocacy trips. The course will educate board members on the importance of interfacing with their representatives so that they can better promote and advance their legislative platforms and funding agendas. This will include a discussion on how to: schedule meetings with relevant legislators, strategize on the talking points and agendas of the meetings, prepare the offices before the meetings take place, effectively advocate during the sessions with legislators, and handle all follow up generated by the meetings. The instructor will provide guidance on how to best select trip dates and how to handle each step of the advocacy trip process. The instructor will also provide an outline on how to best leverage these trips so that relationships are developed and sustained well beyond the meetings.

2:45 – 3:00 p.m.

BREAK (all attendees)

3:00 – 4:00 p.m.

FRAUD DETECTION AND PREVENTION FOR BOARD MEMBERS

Justin Williams, Mann, Urrutia, Nelson, CPAs and Associates, LLP

Discovering fraud in your organization can be devastating. It can cost your organization time, money and loss of public trust. We will review common fraud schemes and demonstrate how to develop procedures to prevent and detect fraud. This presentation will give you the tools to help you ensure you have the proper controls and processes in place to help mitigate fraud risk in your organization.

4:00 p.m.

CONFERENCE ENDS FOR RETURNING ATTENDEES



2018 Registration Form

Special District Leadership Academy Conference

Three Ways to Register

- **Register online** by visiting the Special District Leadership Academy Conference website at leadershipacademy.csda.net.
- **Fax number:** 916-520-2465. All faxed registration forms must include credit card payment.
- **Mail:** CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. Please include registration form and payment. Checks should be made payable to: California Special Districts Association.

Not sure if you are a member?

Contact the CSDA office at 877-924-2732 to find out if your agency or company is already a member. To learn more about the many benefits of CSDA membership, contact Member Services Director Cathrine Lemaire at cathrine1@csda.net or call toll-free at the number listed above.



Name/Title:		
District:		
Address:		
City:	State:	Zip:
Phone:	Fax:	
<input type="checkbox"/> Member <input type="checkbox"/> Non-Member	Email:	
Emergency Contact - Name & Phone:		

WHICH CONFERENCE WILL YOU BE ATTENDING?

FEBRUARY 4-7, 2018 - LA QUINTA EARLY BIRD DISCOUNT: JANUARY 5 <input type="checkbox"/> CSDA Member \$600 <input type="checkbox"/> Non-Member \$900 AFTER JANUARY 5 <input type="checkbox"/> CSDA Member \$650 <input type="checkbox"/> Non-Member \$975	APRIL 15-18, 2018 - MONTEREY EARLY BIRD DISCOUNT: MARCH 16 <input type="checkbox"/> CSDA Member \$600 <input type="checkbox"/> Non-Member \$900 AFTER MARCH 16 <input type="checkbox"/> CSDA Member \$650 <input type="checkbox"/> Non-Member \$975 <hr style="border-top: 1px dotted #ccc;"/> <input type="checkbox"/> First Time Attendee <input type="checkbox"/> Returning Attendee	JULY 8-11, 2018 - NAPA EARLY BIRD DISCOUNT: JUNE 8 <input type="checkbox"/> CSDA Member \$600 <input type="checkbox"/> Non-Member \$900 AFTER JUNE 8 <input type="checkbox"/> CSDA Member \$650 <input type="checkbox"/> Non-Member \$975
--	--	--

SEND MORE - SAVE MORE! -- SPECIAL DISCOUNTED PRICING!

ADDITIONAL ATTENDEE FROM THE SAME DISTRICT BEFORE EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$400 <input type="checkbox"/> Non-Member \$600	ADDITIONAL ATTENDEE FROM THE SAME DISTRICT AFTER EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$450 <input type="checkbox"/> Non-Member \$675
---	--

Payment

Check Visa MasterCard Discover American Express

Acct. Name:	Acct. Number:
Expiration Date:	Authorized Signature:

Special needs

Vegetarian Other:



Risk management requires a well-balanced team.

For over 30 years, our goal has been to serve as an extension of your staff. We provide full-service risk management programs to California public agencies including Property/Liability, Workers' Compensation and Health Benefits coverages. We've built up member programs that surpass anything else on the market and we do it in a way that forms a sturdy foundation for all your coverage and risk management needs.

Learn more about what we do and how we can protect your agency at www.sdrma.org or **800.537.7790**.

SHOW YOUR COMMITMENT AND DEDICATION TO SERVING YOUR COMMUNITY.



The Recognition in Special District Governance was designed to acknowledge special district board members and trustees who have taken extra steps to become better educated in core areas of governance.

Complete the Special District Leadership Academy + 10 additional professional development hours and receive this recognition.



**Available for
only \$15.00* at the
SDLA Conferences.**

This manual includes an overview of the Brown Act as well as guidelines and tips for complying with various meeting agenda, notice, public participation, and public reporting requirements.

Order online at csda.net.

** CSDA Member Pricing*

Order Your Brown Act Compliance Manual.



California Special Districts Association
 1112 I Street, Suite 200
 Sacramento, CA 95814

A proud California Special Districts Alliance partner.

PRSR STD
 U.S. Postage
PAID
 Permit No. 316
 Sacramento, CA

GOVERNANCE LEADERSHIP TRAINING

Three locations throughout the state.

Early bird discount!

New track for returning attendees.
Monterey location only.



CSDA's 2018
**Special District
 Leadership Academy**

*A Comprehensive Governance Conference
 for Elected and Appointed Directors/Trustees.*

*“Another enjoyable
 CSDA experience.”*
 – P. Dorey, Director, Vista Irrigation District