

ACHIEVING DISTRICT GOALS... TOGETHER.



Two Conferences for Training Throughout the State

February 26 – March 1, 2023 – La Quinta (Palm Springs Area)

OR

October 22 – 25, 2023 – Sonoma County (Santa Rosa)



CSDA's 2023
**Special District
Leadership Academy Conference**

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



CSDA


BOARD & STAFF LEARN TO WORK AS A TEAM.


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.

“This conference was very informative and presented well. Each presenter was very knowledgeable on the subject matter. I feel this training should be mandatory for all special district board members and GM’s.”

Scott Frick,
Scott Valley Fire Protection District

 **SPECIAL DISTRICT LEADERSHIP FOUNDATION**

 CERTIFICATE IN SPECIAL DISTRICT GOVERNANCE

BOARD MEMBERS AND TRUSTEES

SHOW YOUR COMMITMENT AND DEDICATION TO SERVING YOUR COMMUNITY.

The **Certificate 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.

1112 I Street, Suite 200, Sacramento, CA 95814 • t: 916.231.2909 • www.sdlf.org



Two Locations • Two Options

ATTEND CSDA'S SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE



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.

Governance is taking the wishes, needs, and desires of the community and transforming them into policies that govern the district.

Whether you're new to the board, or someone who has served for many years, this conference provides essential tools and information to effectively govern your district!

Attendees will learn:

- Teamwork: 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 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!



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.



February 26 – March 1, 2023

Embassy Suites La Quinta Hotel & Spa

50-777 Santa Rosa Plaza
La Quinta, CA 92253

HOTEL ROOM RESERVATIONS

Room reservations are available at the CSDA rate of \$180 plus tax, single or double occupancy. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is January 25, 2023; however, space is limited and may sell out before this date.

CSDA rate includes complimentary full, cooked to order breakfast buffet, complimentary Nightly Managers Reception, complimentary self-parking, and complimentary guest room Wi-Fi.



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Tuesday, January 25, 2023.

Cancellations must be in writing and received by CSDA no later than January 25, 2023 at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after January 25, 2023. Substitutions are acceptable and must be done in writing no later than February 17, 2023 at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@cgsda.net or fax to 916-520-2465.



October 22 – 25, 2023

Hyatt Regency Sonoma Wine Country

170 Railroad Street
Santa Rosa, CA 95401

HOTEL ROOM RESERVATIONS

Room reservations are available at the rate of \$157* plus tax, single or double occupancy plus \$25/night per room discounted destination fee. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is September 22, 2023; however, space is limited and may sell out before this date.

CSDA rate and discounted destination fee includes glass of wine upon check-in, unlimited personal Wi-Fi access, exclusive winery offers from winery partners, electric vehicle charging stations, daily in-room water, and daily wine tasting in lobby.

**Rate at this location will be the current per-diem rate; \$157 as of 11/22 but subject to change.*



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Thursday, September 22, 2023.

Cancellations must be in writing and received by CSDA no later than September 22, 2023, at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after September 22, 2023. Substitutions are acceptable and must be done in writing no later than October 13, 2023, at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@cgsda.net or fax to 916-520-2465.

FIRST-TIME ATTENDEE

SCHEDULE OF EVENTS



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.

TUESDAY

8:30 – 10:00 a.m.

FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership*

This conference 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, strategic goals, and how to communicate those objectives to your constituents.

10:00 – 10:30 a.m.

BREAK (All Attendees)

10:30 – 12:00 p.m.

FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE (continued)

12:00 – 1:00 p.m.

LUNCH PROVIDED (All Attendees)

1:15 – 2:45 p.m.

GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership.*

This conference session looks at common communication breakdowns and potential 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.

MONDAY

8:30 – 10:00 a.m.

BUILDING A FOUNDATION FOR GOOD GOVERNANCE

** This session covers Module 1 of the Special District Leadership Academy: Governance Foundations.*

In this conference session, the instructor will lay the groundwork 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.

10:00 – 10:30 a.m.

BREAK (All Attendees)

10:30 a.m. – 12:30 p.m.

BUILDING A FOUNDATION FOR GOOD GOVERNANCE (continued)

12:30 – 1:30 p.m.

LUNCH PROVIDED (All Attendees)

1:45 – 3:00 p.m.

DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS

** This session covers Module 4 of the Special District Leadership Academy: Board's Role in Human Resources.*

This conference session will teach participants how to determine the human resource (HR) 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.

3:00 – 3:30 p.m.

BREAK (All Attendees)

3:30 – 4:30 p.m.

DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS (continued)

5:30 – 7:00 p.m.

SIP AND SAVOR EVENING RECEPTION

Sponsored by the Special District Risk Management Authority (SDRMA)

Join us for a lively evening of networking and refreshments.



2:45 – 3:00 p.m.

BREAK (All Attendees)

3:00 – 4:00 p.m.

GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH
(continued)

OPEN EVENING

● WEDNESDAY

8:30 – 10:00 a.m.

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

** This session covers Module 3 of the Special District Leadership Academy: Board's Role in Finance and Fiscal Accountability.*

This conference 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.

10:00 – 10:15 a.m.

BREAK (All Attendees)

10:15 a.m. – 12:00 p.m.

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

12:00 p.m.

GRADUATION CERTIFICATE DISTRIBUTION

First-time attendees must attend all sessions and turn in their completed certificate application in order to receive their certificate at the conclusion of the conference.

“I found the programming relevant and timely as a newly elected board member. I liked that staff attended to give different perspectives. The presenters were leaders in their field, very knowledgeable and generous with their time for further discussion.”

Heidi Doyle,

North Tahoe Fire Protection District

Tuesday 4 p.m.

CSDA BENEFITS

BINGO

GAMES FUN WITH PRIZES

We love maximizing the benefits we offer. You love winning prizes! We start with an exploration of membership benefits to make sure your district is taking full advantage of all we provide. Along the way, you'll win prizes!

REASONS TO ATTEND:

- We mentioned prizes, right?
- Learn how to navigate our website & community portal so you can quickly access resources
- Explore CSDA value-added benefits that may save your district money!
- BINGO is for everyone! Members & non-members all benefit
- Meet new peers! This activity has a way of bringing people

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CSDA ANNUAL CONFERENCE
AND EXHIBITOR SHOWCASE

SAVE THE DATE

AUGUST 28 – 31, 2023
MONTEREY, CA

KEYNOTE SPEAKERS



Tuesday, August 29, 2023
Seth Mattison, CEO and Founder of FutureSight Labs

Leadership has always been about one thing: influence. To effectively manage transformation today, leaders must have the understanding and the skill to not only connect with the rational and logical aspects of people's brains but also have the capacity to reach their hearts to understand what ultimately drives human behavior at the deepest level.



Wednesday, August 30, 2023
Matthew Luhn, Formerly with Pixar. Story Artist, Creativity Expert & Author

Storytelling is the #1 business skill necessary to connect, motivate, and lead people in today's world. Stories compel us to engage in experiences, learn lessons, and define our values and ourselves within our organization. Matthew Luhn, a 20-year Pixar story veteran, brings his experience creating and developing 10 blockbuster films at Pixar and provides practical strategies that teach and inspire people and teams to connect more effectively with audiences on an emotional level. Matthew uses the power of storytelling to bridge the gap between business and heart, driving your story toward one unforgettable selling point.

SPONSORS



The informational and educational level of the materials and presentations are very appropriate for seasoned veterans, as well as new and emerging leaders

KARA RALSTON
CAMARILLO HEALTH CARE DISTRICT

SCHEDULE

Monday, August 28, 2023

5:15 - 7:30 p.m.

President's Reception with the Exhibitors - Conference Officially Begins!

Join us in the exhibit hall as we network with business professionals who provide all types of goods and services to special districts. Appetizers, refreshments, and entertainment are provided.

(all registered attendees welcome)

Tuesday, August 29, 2023

7:00 a.m. - 6:00 p.m.

Conference Registration

7:30 - 8:30 a.m.

CSDA Board Meeting

7:30 a.m. – 6:30 p.m.

Exhibitor Showcase Open

7:30 - 8:30 a.m.

Continental Breakfast in the Exhibit Hall

8:45 - 10:45 a.m.

OPENING GENERAL SESSION AND KEYNOTE

The Heart of Leadership: The Secret & Science to Influencing & Leading During Transformation

Seth Mattison, CEO and Founder of FutureSight Labs

AWARDS

- GM of the Year
 - Board Member of the Year
 - Staff Member of the Year
 - SDLF New and Renewing CSDM and Recognition
SDLF Essential Leadership Skills Certificate
-

11:00 a.m. - 12:00 p.m.

BREAKOUT SESSIONS

ABCs of Alternative Delivery Models for Capital Improvement Projects (CIPs)

Melanie Mow Schumacher, Soquel Creek Water District

Public Agencies' Role in Forest Management and Keys to Successful Grant Applications

Joel Metzger, Utica Water and Power Authority

Andrew Fecko, Placer County Water Agency

Mark Egbert, Georgetown Divide & El Dorado County Resource Conservation Districts

Role of the Board, Parliamentary Procedure, Brown Act, and Conflicts of Interest

Oliver Yee, Liebert Cassidy Whitmore

Save Money and Time with Programmatic Environmental Impact Reports (EIRs)

Tom Kennedy, Rainbow Municipal Water District

Malik Tamimi, Rainbow Municipal Water District

Practicing Emotional Intelligence (EQ)

Sylvette Wake, CPS HR Consulting

Required Ethics Compliance Training – AB 1234 (Part 1)

Richard D. Pio Roda and Alex J. Mog, Meyers Nave

LAFCOs – An Additional Resource for Districts

Joe Serrano, LAFCO of Santa Cruz County

12:15 - 1:30 p.m.

Lunch with the Exhibitors

Lunch is included in conference registration.

1:45 - 3:00 p.m.

BREAKOUT SESSIONS

How CUPCCAA Benefits Special Districts in Delivering Public Works Projects

Will Clemens, Oceano Community Services District

Public Events to Build Community Equity

Joshua Bonner, Coachella Valley Public Cemetery District

Victoria Llort, Coachella Valley Water District

CV Strategies

You Can (Central) Bank On It: The Importance and Impact of the Federal Reserve System to Your District's Investment Program

Brent Turner, California CLASS

The Brown Act in a Modern World

Chelsea Straus, Richards Watson Gershon

What's All the Buzz About? How Partnerships Fuel Drone Innovation

Joshua Metz, Regional Government Services

Chris Bley, Insight Up Solutions

Becca Fenwick, UCSC CITRIS Institute for Drone Education & Research (CIDER)

Sophia Selivanoff, Regional Government Services

Ethics (Part 2)

Richard D. Pio Roda & Alex J. Mog, Meyers Nave

See the previous session description (*must attend both sessions*).

Hearings, Protests and Elections, Oh My! Implementing a Property-Related Fee

Kevin King, Reclamation District No. 1000

Eric Grotenhuis, Page Design

Greg Ghironzi, NBS

3:45 - 4:45 p.m.

BREAKOUT SESSIONS

Leadership of Management

Robert Gutierrez, Rainbow Municipal Water District
Steve Hernandez, Water Wise Pro

Pricing Debt: Interest Rates, Fees and Other Variables

CSDA Finance Corporation Consultants:
Rick Brandis, Brandis Tallman, a division of Oppenheimer & Co., Inc.
Albert Reyes, Kutak Rock LLP
Stefan Morton, Municipal Finance Corporation
Don Bartz, Phelan Pinon Hills Community Services District
Nicki Tallman, Brandis Tallman, a division of Oppenheimer & Co., Inc.

How to Recruit When No One Knows What You Do

Kylie Sun, Tripepi Smith
Cathy Thompson, Tripepi Smith Talent Solutions

Embracing Diversity, Equity, Inclusion, and Belonging as the Cultural Norm

Knickeita Vassell Bullock, UKG Public Sector

Privacy and the Need to Share Information in the Workplace

Ryan Quadrel and Rob Cutbirth, Slovak Baron Empey Pinkney & Murphy

Avoiding Conflicts of Interest and Maintaining Public Trust

Alex J. Mog, Meyers Nave

Learn How to Make Your Website Accessible Before A Costly Lawsuit Forces You

Martin Rauch, Rauch Communication Consultants, Inc.
Mac Clemmens, Streamline

5:00 - 6:30 p.m.

Mix and Mingle in the Exhibit Hall

Stop by the exhibit hall for a cocktail and hors d'oeuvres. Be sure to enter for one more chance to win one of our fabulous prizes!

Wednesday, August 30, 2023

7:00 a.m. - 6:00 p.m.

Conference Registration

8:00 - 8:30 a.m.

SDRMA Sponsored Full Plated Breakfast

All registered attendees and exhibitors are welcome.

8:30 - 10:30 a.m.

SDRMA GENERAL SESSION & KEYNOTE

Storytelling for Business

Matthew Luhn, Formerly with Pixar, Story Artist, Creativity Expert & Author

AWARDS:

- SDRMA Awards
 - SDLF New and Renewing Transparency Certificate of Excellence
 - SDLF New and Renewing District of Distinction
-

10:45 a.m. – 12:00 p.m.

BREAKOUT SESSIONS

Understanding Board Member Liability

*Debbie Yokota, CPCU, ARM, Special District Risk Management Authority
Peter Glaessner, Esq. – Allen, Glaessner, Hazelwood & Werth*

The California Public Records Act: Don't Get Caught Unaware!

Sarah Lustig, Atkinson, Andelson, Loya, Ruud & Romo

Blueprint for a Changing Workplace

Terri Bianco, CPS HR Consulting

Current IRS Audits Focused on Special District Issues

Judith Boyette and Mikaela Habib, Hanson Bridgett, LLP

Difficult Conversations--Ethics Complaints Against A Board Member

Steven Miller, Hanson Bridgett, LLP

What to Expect from Your Finance Department

Cindy Byerrum CPA, Eide Bailly
Paul Kaymark CPA, Nigro & Nigro, PC
Larry McKenney, Amador Water Agency

10 Best Practices Every Board Member Should Know

Brent Ives, BHI Management Consulting

11:00 a.m. – 12:00 p.m.

SDLF Board and Annual Meeting

12:15 – 2:00 p.m.

Legislative Update Luncheon

(All attendees welcome)

AWARDS PRESENTED:

- Innovative Project/Program of the Year Award (large district)
 - Innovative Project/Program of the Year Award (small district)
 - Exceptional Public Outreach & Advocacy Award (large district)
 - Exceptional Public Outreach & Advocacy Award (small district)
 - Recognition of Previous and Outgoing Board Members
 - Ralph Heim Exceptional Outreach & Advocacy Award
 - William Hollingsworth Award of Excellence
-

2:15 – 3:15 p.m.

BREAKOUT SESSIONS

Cal/OSHA Requirements Made Simple

Enriqueta (Henri) Castro, CSP, Special District Risk Management Authority

Cybersecurity Best Practices for Special Districts

Corey Kaufman, VC3

Surplus Land Act and Special Districts: Know the Impact

Larry J. Kosmont, Kosmont Financial Services
Matt Cody, Best Best & Krieger LLP

Leading a Values-Based Organizational Culture

Sean Barclay, CSDM, Tahoe City Public Utility District

A Step-by-Step Guide to Building an Effective Multi-Year Strategic Plan

Martin Rauch, Rauch Communication Consultants, Inc.

Skilled and Trained Workforce: When is it Triggered and What are my Agency's Responsibilities?

Deborah Wilder, Contractor Compliance and Monitoring, Inc.

Sexual Harassment Prevention (Part 1)

Victoria Danna, Best Best & Krieger LLP

2:15 - 3:30 p.m.

CSDAFC Board and Annual Meeting

3:45 – 5:00 p.m.

BREAKOUT SESSIONS

Reserves: What Every Board Member, General Manager, Finance Staff AND Taxpayer Should Know

Tom Scaglione, CPA, MBA, Grossmont Healthcare District

Building an Effective Board Management Team – Here's How

Martin Rauch, Rauch Communication Consultants, Inc.

Sexual Harassment Prevention (Part 2)

Victoria Danna, Best Best & Krieger

See previous description (*must attend both sessions for certificate*).

Understanding CEQA's Requirements Regarding Tribal Cultural Resources and AB 52

Amy Hoyt and Sarah Owsowitz, Best Best & Krieger LLP

When the Gavel Strikes: Tips for Efficient and Effective Board Meetings

Craig Steele, Richards Watson Gershon

Contracting Do's and Don'ts: Public Works, Services, Materials, Supplies, and Equipment

Gary Bell, Colantuono Highsmith & Whatley, PC

5:00 – 6:00 p.m.

SDRMA Member Reception

Light appetizers and drinks to be served

6:00 – 9:00 p.m.

Taste of the City

9:00 - 11:00 p.m.

Karaoke After Party

\$25 includes admission and 2 drinks. All proceeds support Special District Leadership Foundation.*

Thursday, August 31, 2023

8:00 – 10:00 a.m.

Closing Breakfast: Connect and Collaborate

Facilitator: David Aranda, CSDM

AWARDS PRESENTED:

- Excellence in Technology
 - Chapter of the Year
 - ILG Beacon Awards
-

10:00 a.m.

Conference adjourns

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Governor Announces Steps To Streamline Delivery Of Infrastructure Projects

ACWA News, 05/19/23

Gov. Gavin Newsom today signed an Executive Order and announced plans to release a package of budget trailer bills aimed at streamlining the delivery of critical projects throughout the state, including water infrastructure projects.

According to a news release from the Governor's Office, his actions aim to speed up construction; expedite court review; streamline permitting; address cumbersome California Environmental Quality Act processes; and maximize federal dollars.

"The only way to achieve California's world-leading climate goals is to build, build, build – faster," Newsom stated during a press conference at the site of a future solar farm in Stanislaus County. This proposal is the most ambitious effort to cut red tape and streamline regulations in half a century. It's time to make the most out of taxpayer dollars and deliver results while creating hundreds of thousands of good jobs. Not since the Pat Brown era have we had the opportunity to invest in and rebuild this state to create the clean future Californians deserve."

ACWA has made permit streamlining a priority issue to help member agencies ensure critical water infrastructure projects are built at the pace and scale needed to respond to the growing impacts of climate change.

"ACWA applauds the Governor's leadership today in announcing actions aimed at streamlining the delivery of infrastructure projects – actions which will help ensure critical water infrastructure projects are built at the pace and scale needed to respond to the growing impacts of climate change," said ACWA Executive Director Dave Eggerton. "ACWA members have been on the front lines of preparing for a changing climate through continued investments in critical water infrastructure. That's why ACWA has made permit streamlining a priority issue. Permit decisions can and must be made more efficiently, while protecting the environment."

This year, ACWA sponsored SB 23 (Caballero), which identified specific opportunities to improve and streamline the regulatory permitting process, while preserving established environmental protections.

While the Senate Appropriations Committee held SB 23, and the bill will not be moving forward this year, ACWA supports the governor's leadership in making this issue a priority for the state. ACWA staff is reviewing the Executive Order and will advocate for permit streamlining in the context of the Newsom Administration's implementation of the Order. ACWA staff will also review and engage on the budget trailer bills as soon as they are released.

In addition, ACWA last year launched Quench California, a statewide campaign to educate Californians about the importance and positive benefits of water infrastructure. Members can access communications toolkit items at www.acwa.com to promote the campaign and encourage residents to visit the website, www.QuenchCA.com, to learn more about this important topic.

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