



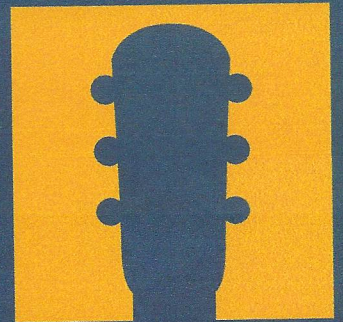
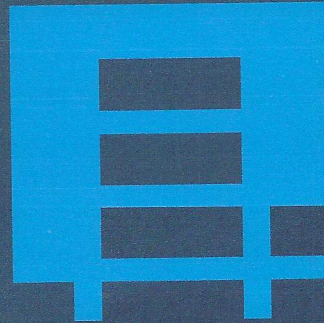
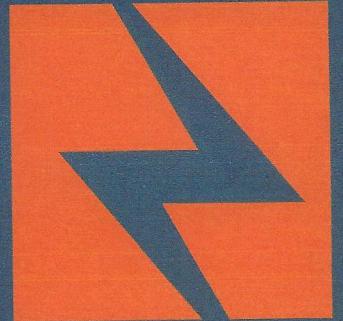
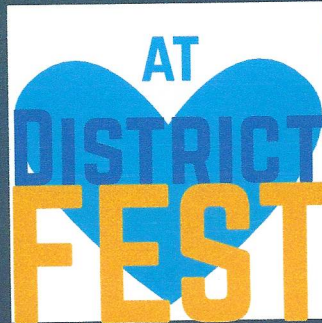
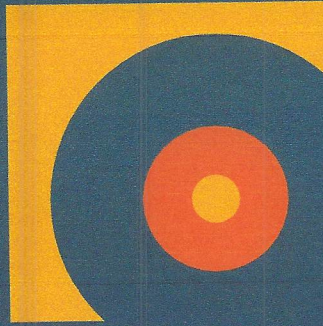
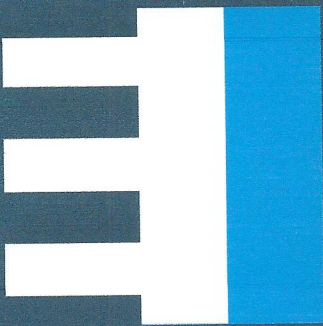
**California Special
Districts Association**
Districts Stronger Together



2024 BOARD SECRETARY/CLERK CONFERENCE

Premiere Training and Certificate Program™ for Board Secretaries/Clerks

WE'RE GETTING THE BAND BACK TOGETHER IN SAN DIEGO, CA



• OCTOBER 21 - 23, 2024 • SAN DIEGO, CALIFORNIA •

**NEW
NEW
NEW**

**14 NEW ADVANCED
ATTENDEE SESSION OPTIONS**

**CHOOSE FROM THREE OPTIONAL
PRE-CONFERENCE WORKSHOPS**

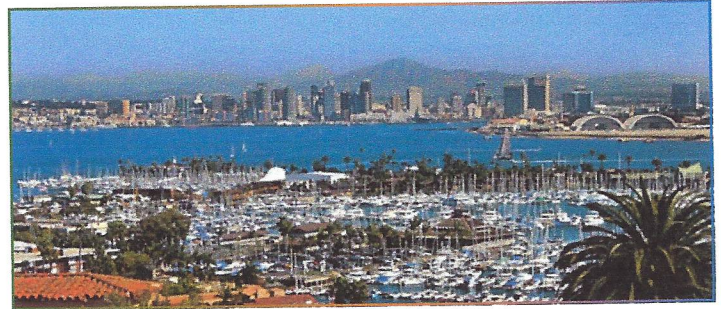
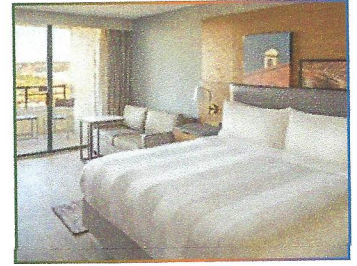
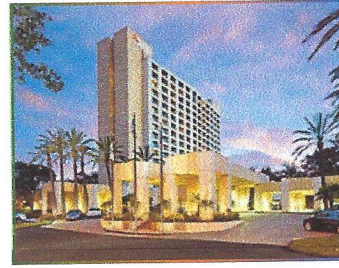
The Art of Electronic Records Management
OR Policy and Procedure Writing
OR Supervisory Skills for the Public Sector

Co-sponsored by the **SDRMA**
Special District Risk Management Authority

Specifically developed and designed for special districts.

Whether you are a new or seasoned board secretary/clerk, continuing education is essential to keeping current on the many aspects of your job. In an effort to expand educational opportunities for this important position in special districts, and to provide an opportunity to recognize individuals who invest the time in becoming trained in the various components of the job, CSDA created this certificate program.

The Board Secretary/Clerk Certificate has become the gold standard for special district board secretaries/clerks throughout California. We invite you to participate as a first-time attendee to earn your certificate or come back year after year to advance your knowledge of special districts through new and exciting breakout sessions tailored to your position.



Credit Incentive Program Points

Special District Risk Management Authority 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 Program points can be earned based on an Agency's attendance at the Board Secretary/Clerk Conference as well as the webinars and workshops associated with the Board Secretary/Clerk Certificate.

[*SDRMA Credit Incentive Program Points]

Certified Municipal Clerk (CMC) and/or Master Municipal Clerk (MMC)

The CSDA Conference beginning October 21, 2024, is eligible for 1 CMC education or 1 MMC advanced education point per four educational hours attended. Post-session assessment completion required. Assessments will be provided in the event app, the online community, and at registration during the conference.

DATE & LOCATION

October 21 – 23, 2024

San Diego Marriott Mission Valley
8757 Rio San Diego Dr.
San Diego, CA 92108

CSDA room reservations in the CSDA room block start at the rate of \$175 plus tax and fees per day. The room reservation cut-off is September 20, 2024; however, space is limited and may sell out before this date. At time of reservation, your credit card on file will be charged a non-refundable advanced payment for 1 night room and tax. The remaining balance will be charged at time of check-in.

Attendees will be emailed a link to obtain reservations at the CSDA rate within 24 hours of registering for the conference.

“

This was such an amazing and well-done conference. I attended the Returning Track and thoroughly enjoyed each of the sessions I attended, the exhibitors, and the women and men I networked with. CSDA and SDRMA did an amazing job at coordinating the entire event, even down to the service dogs and massage chairs. Thank you so much for this amazing experience!

Amie R. Crowder, Running Springs Water District



Monday, October 21, 2024

8:00 a.m.	Pre-Conference Workshop Registration
9:00 a.m. - 4:00 p.m.	PRE-CONFERENCE WORKSHOPS: <ul style="list-style-type: none"> • NEW! The Art of Electronic Records Management* OR • Policy and Procedure Writing* OR • Supervisory Skills for the Public Sector*
4:15 - 5:15 p.m.	CSDA Benefits Bingo! (<i>optional</i>)
5:30 - 7:00 p.m.	Registration and Opening Reception

Tuesday, October 22, 2024

	<i>First-Time Attendees</i>	<i>Advanced: Returning Attendees</i>	
7:30 - 8:30 a.m.	Registration		
8:30 - 9:45 a.m.	Opening Keynote: "The 10 Cent Decision: How Small Change Pays Off Big"		
9:45 - 10:15 a.m.	Break and Networking with the Exhibitors		
10:15 a.m. - 12:15 p.m.	First-Time: Board Secretary/Clerk Foundations	Advanced: NEW! The Person in the Middle —How the Board Secretary/Clerk Can Support an Effective Board, Manager, and Staff Team	Advanced: NEW! Navigating a Transition to By-District Elections
12:15 - 1:15 p.m.	Networking Luncheon (<i>All attendees</i>)		
1:30 - 2:45 p.m.	First-Time: Staying in Compliance (part one)	Advanced: NEW! The Devious & Winding Trail: Conflicts of Interest & Ethical Considerations	Advanced: NEW! Artificial Intelligence (AI): Opportunities and Risks for Special Districts
2:45 - 3:30 p.m.	Break and Networking with the Exhibitors		
3:30 - 5:00 p.m.	First-Time: Advanced Training in the California Public Records Act	Advanced: NEW! Tune Up to Get, and Stay, in Peak Legal Shape	Advanced: NEW! Speak Easy, Speak Well
5:30 - 7:00 p.m.	Networking Reception		

Wednesday, October 23, 2024

8:30 - 10:00 a.m.	First-Time: Staying in Compliance (part two)	Advanced: NEW! Bridging the Government Literacy Gap	Advanced: NEW! Cybersecurity and IT Strategy for Special Districts
10:00 - 10:30 a.m.	Break and Networking with the Exhibitors		
10:30 a.m. - 12:00 p.m.	First-Time: Best Practices for Taking & Processing Meeting Minutes	Advanced: NEW! Trust-Building with Your Communities Through Communications	Advanced: NEW! Public Sector Customer Service
12:00 - 1:00 p.m.	Luncheon (<i>All Attendees</i>)		
1:15 - 2:30 p.m.	First-Time: Website Compliance: Everything Board Secretaries Need to Know	Advanced: NEW! Who Does What and Why: Establishing Good Governance	Advanced: NEW! Developing a Language of Cultural Intelligence - Building a Living Glossary
2:30 - 2:45 p.m.	Break and Networking with the Exhibitors		
2:45 - 4:00 p.m.	First-Time: Understanding Board Member & District Liability Issues	Advanced: NEW! Keeping up with the Brown Act	Advanced: NEW! Increase Positivity and Kindness by Influencing Boards, Directors, and Supervisors
4:00 p.m.	Event Adjourns (<i>Graduation Certificate Distribution</i>)		

*Optional. Pre-registration / Pre-payment required. Price includes lunch.



MONDAY: OCTOBER 21, 2024

9:00 AM– 4:00 PM

Pre-conference Workshops: \$285 CSDA Members, \$430 Non-members

*(*Optional, Pre-payment / pre-registration required – limited space – register early!)*

Pre-Conference Workshop

The Art of Electronic Records Management*

Gladwell Governmental Services, Inc

What are current best practices for managing electronic records in other special districts? What practices should your agency avoid? Diane R. Gladwell, MMC has assisted over 250 local government agencies in California, and has assisted many agencies in implementing best practices and getting control over their electronic records. Learn best practices and worst practices, as well as legal compliance for special district electronic records.

Pre-Conference Workshop

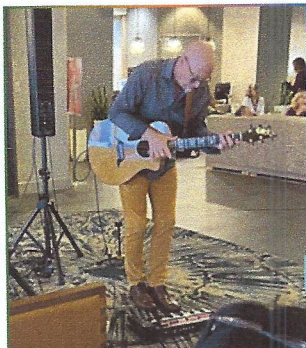
Policy and Procedure Writing*

CPS HR Consulting

This workshop offers practical, relevant, and effective tools to help organizations improve their rules and instructions so employees can actually use them.

During this course, participants learn to:

- ▶ Avoid the most common policy-writing mistakes
- ▶ Distinguish between policies and procedures
- ▶ Organize, write, and edit “reader-friendly” policies, procedures, and tasks



“

It was so nice to come together with my peers. I loved the campfire theme (especially the s'more taffy.) I met so many great individuals who I hope to build lasting relationships with. The food was super amazing as well as the musical talent. A big WOO-HOO!!! to the CSDA staff who pulled together an excellent conference.

Danita Hirsh, South Orange County Wastewater Authority



WE'RE GETTING THE BAND BACK TOGETHER!

Soak in the festival vibes at two evening receptions with your peers and our exhibitors. We'll have games, appetizers, networking, and other special touches to delight our attendees – you won't want to miss these receptions!



WELCOME RECEPTION
MONDAY, OCTOBER 21, 5:30 – 7:00 PM
 Wear your favorite band or concert tee!



RECEPTION
TUESDAY, OCTOBER 22, 5:30 – 7:00 PM
 Yee-Haw – Put on your western wear!

Pre-Conference Workshop

Supervisory Skills for the Public Sector*

CPS HR Consulting

This course for supervisors will discuss and explore the supervisory skills necessary to work with people in the public sector environment. The course will cover what is expected of a supervisor; how to monitor and evaluate employees; and how to coach, mentor, and motivate employees. Through interactive exercises and engaging dialogue, learn to create effective, productive and successful teams; describe the various roles of a supervisor; understand the Emotional Maturity Continuum and how to apply it in the workplace; list best practices for effective performance management; practice defining performance standards; explain the GROW model of coaching; identify what motivates people; list strategies for boosting motivation.

Part of the SDLF Essential Leadership Skills Certificate Program

4:15 – 5:15 PM

CSDA Benefits B-I-N-G-O

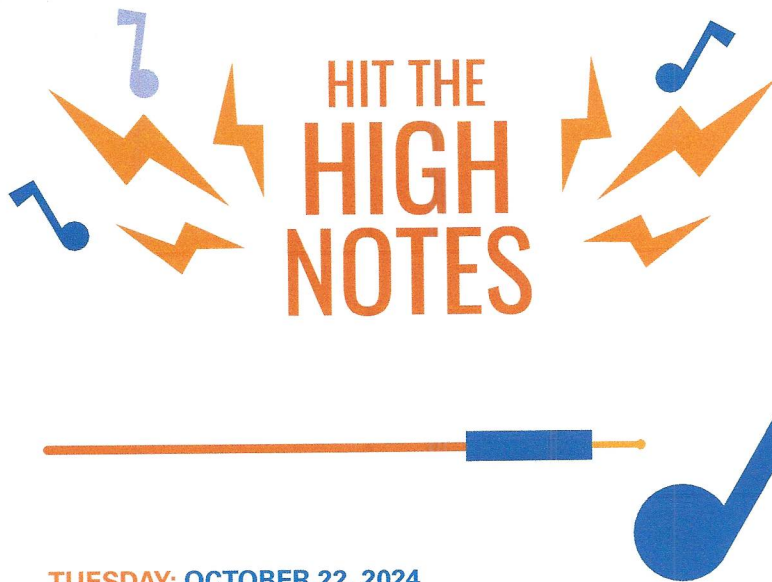
We love maximizing the benefits we offer. You love winning prizes! Let's all do what we love at the Board Secretary/Clerk Conference. We start with an exploration of membership benefits to make sure your district is taking full advantage of all we provide. Along the way, you'll win prizes!

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 together because it's fun!

**COLLABORATE
 AND JAM**




TUESDAY: OCTOBER 22, 2024
8:30 – 9:45 AM
Opening Keynote:

“The 10 Cent Decision: How Small Change Pays Off Big”

Laurie Guest

Service is at the core of special districts. From staff and board culture to interactions with the public, the choices we make day in and day out have the potential to create exceptional experiences for everyone involved. Sure, some decisions are big ones. But more often, it's the “10¢ decisions”—the ones that barely cost a dime but have a massive impact—that can transform service from so-so to stellar. With decades of firsthand experience to draw from, Laurie shares her insights into making smart, effective choices to improve guest encounters and staff satisfaction.

An entrepreneur, keynote speaker and author, Laurie Guest became known as a “go-to-resource” for customer service excellence during a successful career in the healthcare industry. In 1997, she channeled that expertise into Guest Enterprises, Inc., her own speaking and training company. For more than two decades, she has shared her practical point of view on customer service and staff development to audiences across the country, blending real-life examples and proven action steps for improvement. Laurie is an award-winning columnist and the author of two books. With her latest, *The 10¢ Decision: How Small Change Pays off Big*, Laurie presents her most sought-after and impactful strategies to find and retain the best staff and highest-quality customers while delivering exceptional guest experiences. In 2021 Laurie was inducted into the Speaker Hall of Fame, an honor held by less than 1% of speakers worldwide. She lives in northern Illinois where she is a wife, mother of two, lover of board games and below-average cook.



First-time attendees must complete all scheduled first-time attendee sessions in order to receive their certificate at the conclusion of the conference.

Board Secretary/Clerk Foundations

David Aranda, CSDM

The board secretary in a special district plays a multifaceted role that is also one of the most highly visible in the district. Board members, the public, and staff turn to the board secretary as a resource for information and assistance. The board secretary must ensure the district's compliance with extensive legal requirements, handle contentious situations, respond to the needs of board members and the public, document board activities and decisions, and meet multiple deadlines. Start your first-time attendee journey here and together we'll explore the job description and role of the clerk, as well as policies and procedures needed for your district to effectively serve its community.

Staying in Compliance

Atkinson, Andelson, Loya, Ruud & Romo

As times change, so does the need to re-interpret and review the laws governing special districts. This workshop covers crucial areas of the law as they relate to all types of special districts. Those areas include general compliance, answering specific questions about items such as communications through email, special meetings, economic conflicts of interest, and much more.

Advanced Training in the California Public Records Act

Best Best & Krieger LLP

If you are involved with a special district, you need to understand the scope and application of the California Public Records Act (CPRA) to your agency's records, including best practices for records retention as well as responding to public records requests. This training is primarily intended for public agency personnel who have some knowledge of and experience with the CPRA, and who are seeking to expand their understanding of the law. We will cover the key aspects of the CPRA, including when an applicable exemption may give an agency the right to not disclose a particular record or portion of a record. The presenters will use case studies to take you through the entire process from the initial records request to response options. There will also be updates on recent developments in the interpretation and application of the CPRA.

Best Practices for Taking & Processing Meeting Minutes

Best Best & Krieger LLP

"I Want It On The Record!!!" Every clerk dreads hearing those words when taking meeting minutes and clerking a Board of Director's Meeting. In this fast-paced and fun session, learn best practices for taking and processing minutes according to Robert's Rules of Order, and how the clerk can intervene when essential content is missing from the motion. We'll also cover what should and should not be included in minutes (Hint: Not everything is important) and lastly, how to handle those loquacious Board Members who want every word ever spoken to be recorded for posterity. Note that this session does not cover the mental task of listening and scribing minutes, but rather, it describes problems that the presenter has encountered in her three decades of working as a Municipal Clerk and training other Clerks throughout California, Oregon and Alaska.

Website Compliance: Everything Board Secretaries Need to Know

Streamline, Cole Huber LLP

SB 929, AB 434, AB 2257, SB 272, oh my! The list goes on and on. With so many requirements for special districts, staying compliant can be a bear. Not to worry—in this session, the speakers will walk you through everything you need to know to stay compliant in California. You'll leave with a checklist and learn where to go if you have more information or questions.

Understanding Board Member and District Liability Issues

Best Best & Krieger LLP

Having a complete understanding of the potential liability issues in your district can prevent problems in the future and even assist with efficiency and communication protocols. This webinar is a discussion of the legal role of the board in the management and operation of a public agency, and the role of individual board members acting within the course and scope of their official duties.

NEW **The Person in the Middle—How the Board Secretary/Clerk Can Support an Effective Board, Manager, and Staff Team**

Rauch Communication Consultants, Inc., Orange County Mosquito and Vector Control District

Board Secretary/Clerks, through their work with the Board and Management team, often find themselves needing wide-ranging skills to deal with issues that may be out of their formal scope of work, such as: supporting boards and managers to work effectively together, improving board meetings, supporting a productive staff culture, dealing with internal board conflict or micromanagement of the staff, resolving board and manager conflict, responding effectively to the public, and more.

NEW **Navigating a Transition to By-District Elections**

Cordova Recreation and Park District, American River Flood Control District, National Demographics Corporation, and Cole Huber LLP

Whether or not your district has received a demand letter, Board Clerks and Secretaries have likely had the CA Voting Rights Act (CVRA) on their radars and can be prepared to successfully complete the process of a transition to By-District Board elections. This interactive session, led by special district board secretaries/clerks who have completed the transition, will provide experience-based toolkits and resources that will familiarize attendees with key points of the CVRA, Elections Codes and important deadlines for each stage of the process. In addition, it will provide case studies in drawing election district maps and tips for navigating through potential challenges. With the 2024 election cycle in our midst and 2026 fast approaching, what better time to prepare?

NEW **The Devious & Winding Trail: Conflicts of Interest & Ethical Considerations**

Atkinson, Andelson, Loya, Ruud & Romo

Overview of conflicts of interest and ethical considerations under Government Code section 1090 and the Political Reform Act. This presentation will address contractual conflicts, non-contractual conflicts, Conflict of Interest Codes, Form 700 filings, and gifting issues.

NEW **Artificial Intelligence (AI): Opportunities and Risks for Special Districts**

Streamline and Lozano Smith, Attorneys at Law

Local Governments often lack a strong data backup strategy and foundation—leaving them at risk of losing data even when they think they are taking the right steps. Do you have the right data backup strategy in place? We will discuss the essential elements of a data backup and disaster recovery strategy to truly protect your organization's data—specifically touching on how cloud-based solutions can enhance this strategy.

NEW **Tune Up to Get, and Stay, in Peak Legal Shape**

Liebert Cassidy Whitmore

Whether you are new to public sector labor and employment relations, or an experienced practitioner, this legal tune-up ensures you are up to date on the most significant legal developments in this area.

- ▶ Operating at peak efficiency to tackle the challenges ahead.
- ▶ Equal opportunity for fresh or experienced individuals to learn new relevant legal developments

NEW **Speak Easy, Speak Well**

Best Best & Krieger LLP

A speaker is a leader. A better speaker equals a better leader. A good leader leads from the heart, just as a good speaker speaks from the heart. If a speaker is not presenting or communicating clearly and effectively, they put a lid on the potential of their team. Learn how to use the four presenter voices of leadership – teacher, motivator, storyteller, and visionary. Public speaking and leadership are inherently related - discover the connections. Whether you are giving a prepared presentation, speaking spontaneously, or simply communicating with your colleagues, you are auditioning for leadership. Become a better speaker to become a more effective team leader

NEW **Bridging the Government Literacy Gap**

Best Best & Krieger LLP

In a world full of government double-speak and acronyms that tax even the most experienced public employee, the ability to use clear and concise communication has never been more crucial. This session focuses on the principles of writing in plain language and presenting information

in a manner that is both accessible and engaging. Participants will be introduced to fundamental techniques of plain language writing, focusing on clarity, brevity, and directness. These principles will be brought to life through real-world examples from various public agencies.

NEW Cybersecurity and IT Strategy for Special Districts

VC3

In this session we will discuss how to develop an IT strategy roadmap. We will identify the necessary items to build an effective and realistic IT strategy. We will outline the necessary items to build out an effective IT strategic plan. This will include addressing the following items:

- ▶ What is required to build an IT Strategic Plan?
- ▶ Identifying the goals of the local government agency
- ▶ How to identify the current risks and build a realistic plan to remediate those risks
- ▶ How does this impact the budget?
- ▶ How to make sure that we have executed the plan we put together

NEW Trust-Building with Your Communities Through Communications

Tripepi Smith

Is your 218 process going poorly? Did a first amendment audit cause a lot of frustration? Is distrust in your district distracting the Board and staff from the mission? Let's discuss the evolving world of communications, social change and how to help your agency develop the asset of trust with those you serve.

NEW Public Sector Customer Service

Liebert Cassidy Whitmore

The session will cover an expansive myriad of issues related to working for a special district and being a direct representative of the special district to the public. This topic will include:

- ▶ Public Sector Responsibility and Accountability
- ▶ Public Sector Transparency
- ▶ Public Perception of Public Sector Employment
- ▶ Customer Service Standards of Conduct
- ▶ Communicating to Members of the Public About Public Records Act Requests
- ▶ Implicit Bias

NEW Who Does What and Why? Establishing Good Governance

Renne Public Law Group

This session will explain the roles of the Board, individual board members, and district managers to ensure effective governance. Using examples, the session will cover common problems that interfere with effective governance and can result in costly mistakes, including:

- ▶ The roles of Boards and individual members serving on the Board
- ▶ Non-Interference in Administrative Affairs
- ▶ Ensuring Brown Act and Ethics Compliance in Board operations

NEW Developing a Language of Cultural Intelligence – Building a Living Glossary

CPS HR Consulting

Understanding diversity, equity, and inclusion in the post-2020 world requires a new language to effectively communicate through the lens of cultural intelligence. This language reflects a judgment-free perspective that serves to bring different groups of people together through a common understanding and appreciation of the lived experience of others. This module will educate the participants on the common language of DEI to create a common understanding and common connections among diverse groups of people within an organization.

NEW Keeping up with the Brown Act

Liebert Cassidy Whitmore

Public agency board members, and the employees who support them, must understand the complex public meeting and transparency laws established by the Brown Act. Topics include agendas, closed sessions, and administrative decisions. Bring your questions, experiences, and challenges to this interactive, skills-based session!

Continued on the next page >

NEW Increase Positivity and Kindness by Influencing Boards, Directors, and Supervisors

Neal Nybo, Positivity Trainer

Negativity is a national challenge facing managers today. Mastering the craft of expressing positivity and practicing effective kindness today goes beyond understanding of classic leadership principles. It takes personal and authentic micro-actions easy enough for leaders to implement immediately and regularly. In this energetic keynote, Neal shares how board secretaries and clerks can influence the leaders they interact with and their entire organizations.

Now Available as an App!

CSDA

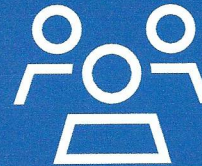
CSDA
The Hub

Available on the App Store

ANDROID APP ON Google play

CSDA - THE HUB

DOWNLOAD TODAY



Connect with your peers attending the conference through the CSDA Board Secretary/Clerk Conference Community. Once you register for the conference you will be subscribed to an online community exclusively for attendees, exhibitors, sponsors, and speakers where you will be able to:

- ▶ Find the most current conference-related information including hotel details, attendee lists, and more
- ▶ Access and download handouts for each session ahead of time
- ▶ Get important event announcements from CSDA staff
- ▶ Connect with your peers before, during, and immediately after the event





CSDA's Special District Board Secretary/Clerk Conference™ • San Diego, CA • October 21-23, 2024

Conference Registration Form

San Diego Marriott Mission Valley | 8757 Rio San Diego Dr. | San Diego, CA 92108

Three Ways to Register

- 1** ONLINE by visiting the CSDA Board Conference Secretary website at <https://csda.net/boardsecretary>.
- 2** FAX your registration form to 916-520-2465. EMAIL your registration form to membership@csda.net (All faxed/emailed forms must include payment)
- 3** MAIL to CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. (please include registration form along with payment. Check should be made payable to: California Special Districts Association).

ONE FORM PER REGISTRANT. PLEASE MAKE COPIES AS NEEDED.			
Name/Title:			
District:			
Address:			
City:	State:	Zip:	
Phone:	Fax:		
Email:			
Special Needs (Including Dietary):			
Emergency Contact Name:		Emergency Contact Phone:	
BOARD SECRETARY/CLERK CONFERENCE OPTIONS			
Current Certificate Holder: <input type="checkbox"/> YES <input type="checkbox"/> NO			
I will be participating as: <input type="checkbox"/> First-time Attendee <input type="checkbox"/> Advanced/Returning Attendee			
EARLY BIRD REGISTRATION - On or Before Friday, September 20, 2024 <input type="checkbox"/> SDRMA Member** - \$660 <input type="checkbox"/> CSDA Member - \$720 <input type="checkbox"/> Non-member - \$1,080			
REGULAR REGISTRATION - AFTER September 20, 2024 <input type="checkbox"/> SDRMA Member** - \$720 <input type="checkbox"/> CSDA Member - \$775 <input type="checkbox"/> Non-member - \$1,160			
PRE-CONFERENCE WORKSHOPS: <input type="checkbox"/> The Art of Electronic Records Management* OR <input type="checkbox"/> Policy and Procedure Writing* OR <input type="checkbox"/> Supervisory Skills for the Public Sector*			
<input type="checkbox"/> CSDA Member - \$285 <input type="checkbox"/> Non-member - \$430			
			TOTAL \$
PAYMENT INFORMATION			
<input type="checkbox"/> Check <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express <input type="checkbox"/> Discover			
Acct. name:		Acct. number:	
Expiration date:	Zip Code:	CVC code:	Authorized signature:

**SDRMA property/liability and/or workers' comp members – health benefits only do not qualify for discount.

Mail, fax or email completed form to:
 California Special Districts Association
 1112 I Street, Suite 200
 Sacramento, CA 95814
 Fax: 916.520.2465
 Email: membership@csda.net

Questions?

Please contact us toll-free:
877.924.2732

Cancellations/Substitution Policy: Cancellations must be in writing and received by CSDA no later than September 20, 2024 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 20, 2024. Substitutions are acceptable and must be done in writing no later than October 11, 2024 at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@csda.net or fax to 916-520-2465.

Consent to Use Photographic Images: Registration and attendance at, or participation in, CSDA meetings and other activities constitutes an agreement by the registrant for CSDA's use and distribution (both now and in the future) of the registrant's or attendee's image or voice in photographs, videotapes, electronic reproductions, and audiotapes of such events and activities.

Our Anti-Discrimination and Harassment Policy can be found under "CSDA Transparency" at www.csda.net/about-csda/who-we-are.