



**California Special
Districts Association**
Districts Stronger Together



2021

BOARD SECRETARY/CLERK CONFERENCE

Premiere Training and Certificate Program™ for Board Secretaries/Clerks

October 25 – 27, 2021 • Anaheim, California

Advanced Courses for Returning Certificate Holders!

TWO! Optional Pre-Conference Workshops:
Capturing Better Meeting Notes OR
E-Records, E-Mail, Trustworthy Electronic Records, Retention,
Document Imaging, and Other Leadership Opportunities

NEW! NEW! NEW! 12 NEW Advanced Attendee Session Options



*Co-sponsored by the
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.

New Advanced Attendee Sessions

**12 NEW
SESSIONS!**

MANY SESSIONS TO CHOOSE FROM

Held on Tuesday and Wednesday

There are many new sessions to choose from for returning attendees that include topics such as running an effective board meeting, tips from attorneys, and roles of the board secretary or clerk. 12 new sessions for this event include:

- **Recognizing Employee Contributions**
- **Transparency: Tips and Best Practices for Open Government**
- **Project Management and Project Leadership: You Need Both**
- **Trending: Using Social Media to Promote Transparency and Accountability**
- **Recent Developments in the Law for Special Districts**
- **Elevating the Role of Executive Assistant into a Strategic Business Partner**
- **Key Communication Tips**
- **Effective and Legal Meetings in a Technology World**
- **Data Automation vs. Manual Tasks? – No Contest!**
- **Business Impact Analysis: The Cornerstone of Building a Business Continuity Program**
- **Recent Developments in the California Voting Rights Act**
- **How to Rock Your Next Performance Evaluation**
(Pro Tip: Treat it like a Job Interview)



DATE & LOCATION

October 25 – 27, 2021 • Anaheim, CA

Embassy Suites Anaheim South
11767 Harbor Boulevard
Garden Grove, CA 92840

Room reservations are available at the Embassy Suites Anaheim South at the CSDA rate of \$142 plus tax, single or double occupancy online or by calling (714) 539-3300. The room reservation cut-off is September 28, 2021; however, space is limited and may sell out before this date. The CSDA room rate includes parking.



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 Points can be earned based on attendance of the Agency's management staff or governing body at the Board Secretary/Clerk Conference as well as the webinars and workshops associated with the Board Secretary/Clerk Certificate. [***SDRMA CIP**]

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

The CSDA Conference beginning October 25, 2021 is eligible for 1 CMC Experience or 1 MMC Professional Contribution point per education day of attendance.

Conference Schedule

Monday, October 25, 2021			
8:00 a.m.	Pre-Conference Workshop Registration		
9:00 a.m. - 4:00 p.m.	Pre-Conference Workshops <i>(optional/additional fee)</i> <ul style="list-style-type: none">• Capturing Better Meeting Notes OR• E-Records, E-Mail, Trustworthy Electronic Records, Retention, Document Imaging, and Other Leadership Opportunities		
5:30 - 7:30 p.m.	Registration and Opening Reception		
Tuesday, October 26, 2021			
	<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: 55 Ways to Add Disney Magic to Your Special District, Pete Blank		
9:45 - 10:15 a.m.	Break, Networking with the Exhibitors		
10:15 a.m. - 12:00 p.m.	Staying in Compliance: Understanding Fundamental Special District Laws	Recognizing Employee Contributions	Transparency: Tips and Best Practices for Open Government
12:00 - 1:00 p.m.	Lunch, All Attendees		
1:15 - 2:45 p.m.	The Role of the Clerk and Meeting Minutes	Project Management and Project Leadership: You Need Both	The Empty Chair: Handling Board Vacancies and Appointments
2:45 - 3:15 p.m.	Break, Networking with the Exhibitors		
3:30 - 5:00 p.m.	Online ADA Compliance and Transparency: What Board Secretaries and Clerks Need to Know	Trending: Using Social Media to Promote Transparency and Accountability	Recent Developments in the Law for Special Districts
5:30 - 7:30 p.m.	Reception		
Wednesday, October 27, 2021			
	<i>First-Time Attendees</i>	<i>Advanced: Returning Attendees</i>	
8:30 - 10:00 a.m.	Board Secretary / Clerk Foundations	Elevating the Role of Executive Assistant into a Strategic Business Partner	Understanding California’s Prohibition on Gift of Public Funds
10:00 - 10:30 a.m.	Break, Networking with the Exhibitors		
10:30 a.m. - 12:00 p.m.	Board Secretary / Clerk Foundations (cont’d)	Key Communication Tips	Effective and Legal Meetings in a Technology World
12:00 - 1:00 p.m.	Lunch, All Attendees		
1:15 - 2:30 p.m.	Advanced Training in the California Public Records Act	Data Automation vs. Manual Tasks? – No Contest!	Business Impact Analysis: The Cornerstone of Building a Business Continuity Program
2:30 - 2:45 p.m.	Break		
2:45 - 4:00 p.m.	Understanding Board Member & District Liability Issues	Recent Developments in the California Voting Rights Act	How to Rock Your Next Performance Evaluation (Pro Tip: Treat it like a Job Interview)
4:00 p.m.	Event Adjourns, Graduation Certificate Distribution		



OPENING KEYNOTE:
55 Ways to Add Disney Magic to Your Special District
Pete Blank

In this fast-paced and engaging session, former Disney University Leader Pete Blank shares how you can add Disney Magic to your district. He will take a “magical” look at how Disney’s business and leadership strategies can impact your personal and professional life. This session will share many “magical” skills that are needed for local board secretaries and city clerks to survive and thrive everyday. Attendees will leave with actionable ideas they can immediately add to their leadership toolkit.

Pre-Conference Workshops | 9 AM – 4 PM
Monday, October 25, 2021

PRE-CONFERENCE WORKSHOPS - TWO TO CHOOSE FROM

*OPTIONAL/ADDITIONAL FEE – LIMITED SPACE – REGISTER EARLY!

\$225 CSDA MEMBER, \$340 NON-MEMBER (INCLUDES LUNCH)

- Capturing Better Meeting Notes
- E-records, E-mail, Trustworthy Electronic Records...

Capturing Better Meeting Notes

Jordan Peabody, Peabody Communications

Producing great minutes can be tough. It's a challenge to capture meeting notes while participating in the proceedings – let alone keep up with all those discussions and motions. What if there was a way to survive the meeting as the note-taker and create minutes that are actually useful? This full-day pre-conference session will boost your recording prowess throughout all stages of the note-taking process.

Before the Meeting:

- Identify your audience
- Determine what information your readers need
- Design note-taking "framework" templates

During the Meeting:

- Increase note-taking speed
- Understand your role: Just seen or seen and heard
- Read the room: Recognize group decisions without motions
- Discover various note-taker "shortcuts"
- Handle discussion digressions
- How to participate and record simultaneously

After the Meeting:

- Select final content based on relevance
- Present material in a "reader-friendly" format
- Practice verbal shortcuts for repetitive idea patterns
- Produce clearer, more concise notes with active expression
- Increase readability through shorter sentences and everyday language

E-Records, E-Mail, Trustworthy Electronic Records, Retention, Document Imaging, and Other Leadership Opportunities

Diane Gladwell, Gladwell Governmental Services, Inc.

Interactive session to provide knowledge of, and the application of, legal requirements and best practices for e-mail, trustworthy electronic records and records retention, knowledge of technology options and best practices in managing electronic records and e-mail. This session covers: media and devices, terminology, electronic records and e-mail retention, legal requirements and trustworthy electronic records, records retention for e-records, e-mail and document imaging systems, technology options and software solutions, taxonomies, best practices, and leadership opportunities in your organization.

Keynote Speaker | 8:30 – 9:45 AM
Tuesday, October 26, 2021



OPENING KEYNOTE

55 Ways to Add Disney Magic to your Special District, Pete Blank

In this fast-paced and engaging session, former Disney University Leader Pete Blank shares how you can add Disney Magic to your district. He will take a "magical" look at how Disney's business and leadership strategies can impact your personal and professional life. This session will share many "magical" skills that are needed for local board secretaries and city clerks to survive and thrive everyday. Attendees will leave with actionable ideas they can immediately add to their leadership toolkit.

As a leadership expert and training manager, Pete Blank works with companies who want to create engaged employees, successful leaders and loyal customers. His "Pete's Points" video leadership lessons reaches over 8,000 people each week, while his "Pete's Points" daily audio briefing has thousands of subscribers in multiple countries. For 13 years, he worked with The Walt Disney Company where he developed and delivered career development programs for over 55,000 Cast Members. Pete is a Certified Speaking Professional, an Emmy-award winner, and a former Wheel of Fortune contestant, and he's speaking to show us how to put a little Disney magic into our organizations.

First 250 registered attendees receive a copy of Pete's book!

Sessions for First-Time Attendees*

Board Secretary/Clerk Foundations

David Aranda, CSDM

The board secretary in a special district plays a multi-faceted 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. This course provides a comprehensive review and insight into all components of the board secretary/clerk position.

Understanding Board Member and District Liability

Ruben Duran, 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 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.

Staying in Compliance: Understanding Fundamental Special District Laws

Rachael Hundley, Meyers Nave

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.

The Role of the Clerk and Meeting Minutes

Stephanie Smith, MMC, Best Best & Krieger LLP

"I Want It On The Record!" Every clerk dreads 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, 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.

Online ADA Compliance and Transparency: What Board Secretaries and Clerks Need to Know

Sloane Dell'Orto and Sean De Burgh, Districts > Forward and Cole Huber, LLP
Special districts face ADA compliance as well as a number of website posting requirements that can seem overwhelming, but compliance is actually pretty straightforward. This session will start with the basics (the six requirements in California), including walking through the specifics of Enterprise System Catalog creation, which is required by SB 272.

Advanced Training in the California Public Records Act

Kane Thuyen, Burke Williams Sorensen

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.



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

Sessions for Advanced Attendees

Recognizing Employee Contributions

Allison Horak, CPS HR Consulting

Recognizing employee contributions should be an integral part of any performance management strategy. The good news is it's easy to do and usually costs nothing; the bad news is, it's easy to get wrong. In this session, we'll discuss how to create a culture of recognition in our workplaces and brainstorm specific and meaningful ways we can call out stellar performance.

Transparency: Tips and Best Practices for Open Government

Craig Steele, Richards Watson Gershon

Public meetings influence how your agency is perceived by the public. Basic meeting management strategies can make board meetings more effective and promote an image of efficiency and transparency.

"How to Rock Your Next Performance Evaluation (Pro Tip: Treat it like a Job Interview)"

Stephanie Smith, MMC, Best Best & Krieger LLP

Evaluating your performance before your next evaluation can be stressful, to say the least. Am I doing okay? Do I need to work on something? What will he/she say about me? Knowing how well you're doing before hearing it from "the boss" is key to improving deficiencies and elevating your performance to the next level. In this session, participants will gain a better understanding of the relationship between performance and professional growth opportunities and how to apply that understanding to their current positions.

Participants will learn how to:

- Analyze their current job performance to identify strengths
- Craft an exciting opening (and closing) statement
- Build confidence in their knowledge, skills and abilities that can be applied right now

And leave with a better understanding of:

- How practicing for an interview can build confidence in one's abilities, which leads to better performance and more effective decision making in the current position
- The importance of effective listening when working in the public sector
- 10 Things That Require Zero Talent and how those 10 things will improve performance in any position

The Empty Chair: Handling Board Vacancies and Appointments

Rachael Hundley, Meyers Nave

This session will explain the regulatory requirements (CA Government Code section 1780) for providing notice of board vacancies and the steps involved in three primary options for filling vacancies, including appointment, election, or action by a County Board of Supervisors. Presenter will also discuss board governance and procedures regarding board member absence, incapacity and/or misconduct (and related removal), as well as best practices for internal and external communications during times of transition and crisis.

Trending: Using Social Media to Promote Transparency and Accountability

Michelle Villareal and Anahil Sargsyan, Aleshire & Wynder, LLP

This session will explore the benefits of using social media to promote transparency and accountability of local government, as well as the unique challenges arising in complying with the Brown Act in a virtual era. The presentation will look at potential violations of the Brown Act when government officials utilize social media and offer best practice tips to ensure compliance. Included will be a discussion on pending legislation to modernize the Brown Act to meet the changes and challenges of governing in a post-pandemic world.

Recent Developments in the Law for Special Districts

David Boyer, Atkinson, Andelson, Loya, Ruud & Romo

Learn about recent legislation and court decisions impacting special districts that are particularly relevant for board clerks and secretaries. This will include discussion ranging from ensuring compliance with the Brown Act to changes in the law and regulations governing real estate transactions involving special districts.

Elevating the Role of Executive Assistant into a Strategic Business Partner

Dawn Benson, East Bay Municipal Utility District

The executive assistant role is expanding in the private and public sectors world-wide. This workshop will share the tips and tricks of building a strategic partnership with your executive, building your network within your company, training, and resources to develop your toolkit of skills necessary for your administrative professional success!

Understanding California's Prohibition on Gift of Public Funds

Nick Ghirelli, Richards Watson Gershon

This session will explain the constitutional prohibition against gifts of public funds and analyze situations where disbursements of district assets trigger the prohibition or serve legitimate public purposes.

Key Communication Tips

Antoinette Joy, CPS HR Consulting

Learn key communication tips to help deliver outstanding customer service to external and internal customers. This session delves into tactics for problem-solving and relationship building using emotional intelligence.

Effective and Legal Meetings in a Technology World

Lindsay Thorson, Richards Watson Gershon

Use of technology by board members, and during board meetings, can lead to more efficient and accessible meetings, but it can also open a Pandora's box of pitfalls. This presentation will explore how districts can harness the value of incorporating technology into the board room, while minimizing the potential risks. Topics will include best practices for cloud-based document storage, electronic agenda packets, use of social media, compliance with the Brown Act, accessibility, and more.



Look for this image to see the new sessions!

12 NEW SESSIONS!

Project Management and Project Leadership: You Need Both

Sloane Dell'Orto, Districts > Forward

Standard project management makes most people think of Gantt charts and spreadsheets (ugh) - and while we'll touch on some of the standard PM tools in this session, we're also going to step back a bit and come at it from a different angle. We'll start by exploring motivation, get inspired by our noble causes, and do some fun exercises together. You'll leave with helpful tips and tools to take back and implement immediately, to ensure the next project you tackle will be a success.

Data Automation vs. Manual Tasks? – No Contest!

Trish Conner-Cato, CPS HR Consulting

As a professional in the public sector, you are probably working with complex data sets, multiple databases, and pressure-filled deadlines. This session will show you how to automate many data-related tasks with little effort on your part, allowing you to noticeably increase your personal productivity and produce more reliable work.

Business Impact Analysis: The Cornerstone of Building a Business Continuity Program

Nora O'Brian, Connect Consulting Services

According to the Federal Emergency Management Agency, more than 40% of organizations and businesses that do not have plans fail after disaster strikes. During this COVID-19 Pandemic, special districts had to dramatically change their business processes to keep operating despite many challenges. In this session "Business Impact Analysis: The Cornerstone of Building a Business Continuity Program", Connect Consulting Services, experts in emergency management and business continuity planning, will share resources and strategies on how to develop your Business Impact Analysis (BIA) that serves as a foundation for your business continuity program (BCP). Through the BIA process, you identify your essential business functions, the recovery time for those business functions to be brought back online post-disaster, and the staff, supply chain, work location, and technology dependencies those business functions need to operate post-disaster. Once your essential business functions are identified, this information will serve to guide your disaster recovery actions.

Recent Developments in the California Voting Rights Act

Derek Cole, Cole Huber

This presentation will provide updates regarding the conversion to district elections under the California Voting Rights Act ("CVRA") and the redistricting process (for those special districts that currently have district elections). The presentation will address recent court cases interpreting the CVRA and the legal requirements for creating districts.



This conference is a must for any board secretaries looking to raise the bar in their performance, keep abreast of current laws and practices, and stay sharp in their role. Networking opportunities abound and to learn what general managers and board of directors truly need of us. This conference is truly a great investment.

Naomi Sabino, Olivenhain Municipal Water District

Two MAGICAL RECEPTIONS

- **Welcome Reception on Monday, October 25**
- **Reception on Tuesday, October 26**

Be sure to join us for two magical receptions with your peers and our exhibitors. With special touches to surprise and delight our attendees – we know these receptions will be on your must-do list.

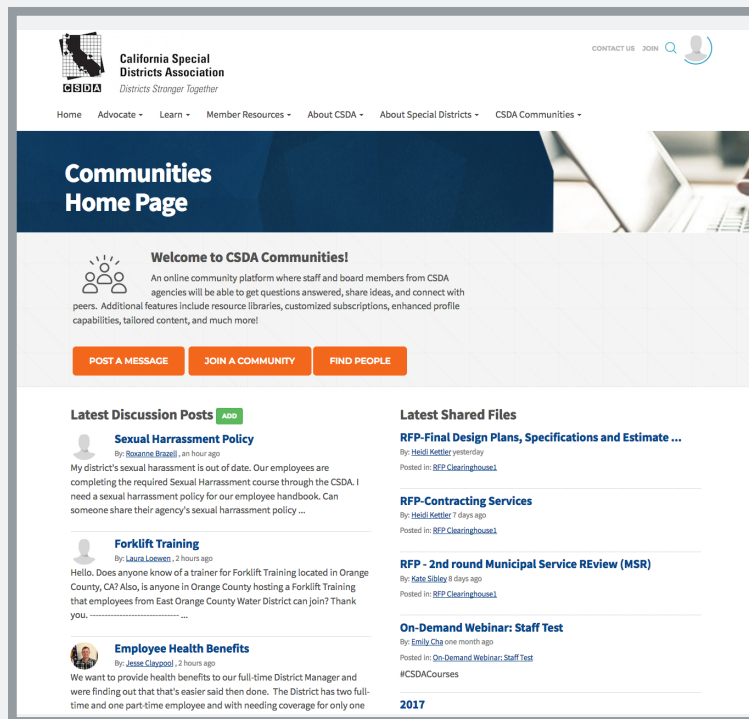
ONLINE COMMUNITY

Join the Community at csda.net

Connect with your peers attending the conference through the CSDA Special District 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.

Get important event announcements from CSDA staff. Connect with your peers before, during, and immediately after the event.



CSDA BOOKSTORE

The CSDA Bookstore has many great resources that can be of value to you and your district. Some of our highlighted products include:



Administrative Salary & Benefits Survey – designed to provide you with the data necessary to evaluate the salary and benefits offered by special districts.



Sample Policy Handbook – Our collection of over 100 essential policies includes policies for board and board meetings, administration and financial management and personnel. Delivered on a USB drive in an editable format to allow you to customize your policies.



2022 Required State & Federal Labor Law Poster – Available for preorder now.

These are only a few of the resources available to purchase online at www.csda.net or at the CSDA Bookstore while at the conference.



SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY

Risk Management Built to Last

As a trusted risk management advisor, SDRMA makes it easy for you to proceed with confidence. Our team is like one of your own, delivering service and expertise you won't find anywhere else. For everything from **Workers' Compensation** and **Property/Liability** coverages to **Health Benefits** options available throughout California, we are here to help. For more information, visit sdrma.org.





Board Secretary/Clerk Conference & Certificate Program™

Anaheim: October 25 – 27, 2021

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:

Phone:

BOARD SECRETARY/CLERK CONFERENCE OPTIONS

Current Certificate Holder: ☐ Yes ☐ No

I will be participating as: ☐ First-time Attendee ☐ Advanced - Returning Attendee

EARLY BIRD REGISTRATION - ON OR BEFORE FRIDAY, SEPTEMBER 24, 2021 Member status: ☐ SDRMA Member - \$525 ☐ CSDA Member - \$575 ☐ Non-member - \$865

REGULAR REGISTRATION - AFTER FRIDAY, SEPTEMBER 24, 2021 Member status: ☐ SDRMA Member - \$575 ☐ CSDA Member - \$625 ☐ Non-member - \$940

PRE-CONFERENCE WORKSHOP: CAPTURING BETTER MEETING NOTES ☐ CSDA Member - \$225 ☐ Non-member - \$340

NEW! PRE-CONFERENCE WORKSHOP: E-RECORDS, E-MAIL, TRUSTWORTHY ELECTRONIC RECORDS... ☐ CSDA Member - \$225 ☐ Non-member - \$340

TOTAL \$

PAYMENT INFORMATION

☐ Check ☐ Visa ☐ MasterCard ☐ American Express ☐ Discover

Acct. name:

Acct. number:

Expiration date:

CVV code:

Authorized signature:

Mail or Fax completed form to:
California Special Districts Association
11121 Street, Suite 200
Sacramento, CA 95814
f: 916.520.2465

Questions?

Please contact us toll-free:
877.924.2732

Cancellations/Substitution Policy: Cancellations must be in writing and received by CSDA no later than October 8, 2021. All cancellations received by this date will be refunded less a \$75 processing fee. There will be no refunds for cancellations made after October 8, 2021. Substitutions are acceptable and must be done in writing no later October 15, 2021. Please submit any cancellation notice or substitution request 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 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.

CSDA will be following COVID safety guidelines.



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

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Premiere Training and Certificate Program™ for Board Secretaries/Clerks

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