



**California Special  
Districts Association**  
*Districts Stronger Together*

## Board Member/Trustee Resources

### **AFTER TAKING OFFICE**

#### **MUST HAVE**

*Frequency: every two years*

#### **ETHICS AB1234 (LIVE OR WEBINAR)**

The basic thrust of AB 1234 is to require covered officials ...to take two hours of training in ethics principles and laws every two years.

“Basically the requirement applies to those elected or appointed officials who are compensated for their service or reimbursed for their expenses. The specific trigger for this requirement is whether the agency either compensates or reimburses expenses for members of any of its Brown Act covered bodies; if it does, then all elected and appointed “local agency officials” (as defined) must receive this training. “Local agency official” means any member of a legislative body or any elected local agency official who receives compensation or expense reimbursement.” Those Beginning Service After January 1, 2006. Those who enter office after January 1, 2006 must receive the training within a year of starting their service. They must then receive the training every two years after that.” - ILG

#### **HARASSMENT PREVENTION (LIVE OR WEBINAR) 2 HOURS**

*Additional Resource:*

Understanding the Basics of Public Service Ethics Laws (download)

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#### **BEST PRACTICES**

Subject Areas for Board Members: Finance, Brown Act, CA Public Records Act, Liability

*Frequency: at least once, ideally during first year in office - repeat as need with changes and updates to the law*

#### **INTRODUCTION TO SPECIAL DISTRICT FINANCES FOR BOARD MEMBERS (WEBINAR)**

As a board member / trustee, your responsibilities include providing fiscal oversight of the special district’s finances. This course will help you fulfill these responsibilities by providing you with the knowledge and tools you need to gain a better understanding of the flow of a special district’s day-to-day transactions, accounting systems, and financial statements.

***BROWN ACT COMPLIANCE (MOST OFTEN AVAILABLE AS WEBINAR)***

This webinar will provide education for public officials and employees at all levels about the legal requirements and procedures to ensure public business is conducted in full compliance with California's transparency laws. Attendees will learn the Brown Act's requirements concerning agendas, meeting procedures, public participation and permissible closed session exceptions. Attendees will also learn about potential pitfalls that may lead to inadvertent violations as a result of the use of email, text messaging and social media as well as emerging issues and legislative updates.

***CA PUBLIC RECORDS ACT (MOST OFTEN AVAILABLE AS A WEBINAR)***

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. 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. There will also be updates on recent developments in the interpretation and application of the CPRA.

***UNDERSTANDING BOARD MEMBER & DISTRICT LIABILITY ISSUES (WEBINAR)***

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.

***ON-DEMAND WEBINARS***

Select from these offerings based on the needs of your district as well as your own professional development. New On-Demand Webinars are added throughout the year so be sure to check back frequently.

- Accessing Legislative & Outreach Information
- CA's Broad Conflict of Interest Law and How to Avoid It
- Completing Your Statement of Economic Interest - Form 700
- Election Law Compliance: The Rising Tide of CVRA Claims
- Exercising Legislative Authority
- Fraud Environment - Tips for Detection and Controls Survey
- General Manager Evaluations
- Getting Oriented: Resources for New Board Members
- Intro to Special District Finance for Board Members
- Public Engagement and Budgeting
- Understanding Board & District Liability Issues 2020
- Who Does What? Best Practices in Board/Staff Relations

*Additional Resources:*

- Update your CSDA Community Profile and Notifications
- Special District New Board Member Handbook (download)
- Parliamentary Procedure Quick Reference for Special Districts (download)
- California Public Records Act Compliance Manual for Special Districts (download)
- Brown Act Compliance Manual (purchase, CSDA Bookstore)
- Understanding Special District Board Member Compensation
- Special District Laws Reference Guide

## **MISSION CRITICAL**

*Frequency: First-time track should ideally be completed within your first year in office. Returning track as you are able in order to keep current and dive deeper into governance issues.*

### **SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE**

A 2.5-day conference held twice a year that focuses exclusively on the role of the board and an effective governance team.

Attendees will 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!

*Additional Resources:*

- ILG Good Governance Checklist (download)
- Take Action: Engaging with Your Community and Legislators (download)
- SDLF District Transparency Certificate of Excellence Checklist (download)
- SDLF High Performing District Checklist (download)
- Special District Reserve Guidelines, Second Edition (download)
- Special District Revenues Guide (download)
- CDIAAC Local Agency Investment Guidelines (download)

*Optional Resources:*

- Boards that Make a Difference (3rd Ed.) John Carver © 2015
- Reinventing Your Board (Revised Ed.) John Carver and Miriam Carver © 2006
- The Policy Governance Model and the Role of the Board Member (Revised Ed.) John Carver and Miriam Carver © 2009
- Recognition: Earn your SDLF Certificate in Special District Governance by completing the Special District Leadership Academy Conference (first-time track) plus ten additional hours of continuing education from CSDA (or any other state-wide association specializing in local government) within two years.

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## **ONGOING**

### **CSDA ANNUAL CONFERENCE & EXHIBITOR SHOWCASE (ONCE PER YEAR, LATE SUMMER/EARLY FALL)**

Enables attendees to stay current on the latest in legal, HR, governance, leadership and other issues impacting all special districts.