



**California Special
Districts Association**
Districts Stronger Together

Board Secretary/Clerk Resources

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.”

HARASSMENT PREVENTION (LIVE OR WEBINAR) 2 HOURS

Additional Resource:

Understanding the Basics of Public Service Ethics Laws (download)

BEST PRACTICES

Subject Areas for Board Secretaries and Clerks: Finance, HR, Brown Act, CA Public Records Act

Frequency: As needed

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.

FINANCIAL MANAGEMENT FOR SPECIAL DISTRICTS (WORKSHOP)

Money, money, money...it's on everyone's mind and on your job description. Make sure you understand the full scope of financial information affecting special districts today. From budgeting and internal controls to long term planning and capital improvement plans. Attendees will get the information they need to begin to assess the overall financial health of their district and steps needed to make positive changes.

HR BOOT CAMP FOR SPECIAL DISTRICTS (WORKSHOP)

Are you prepared to face the important HR trends that are emerging now? CSDA is pleased to present a full day HR Boot Camp that will cover cutting edge information that HR professionals at special districts need to know. Divided into four segments: hiring, performance evaluation, employee discipline, and legal trends, this day is designed to maximize your time and give you substantive information you can use at your district right away.

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.

- A Practical Guide for Creating New Board Member Orientation
- Achieving Transparency Isn't as Hard as It Seems
- Advanced Training in the California Public Records Act
- Best Practices in Agenda Preparation & Taking Minutes
- Brown Act Compliance During a Pandemic
- CA's Broad Conflict of Interest Law and How to Avoid It
- Completing Your Statement of Economic Interest – Form 700
- Customer Service in the Public Sector
- Developing and Implementing a Records Retention Schedule
- Exercising Legislative Authority
- Implementing an Electronic Content Management System
- Online ADA Compliance & Transparency Requirements
- Records Retention and Management in the Electronic Age
- Rules of Order Made Easy!
- Understanding Board & District Liability Issues
- We Should See You – Brown Act Compliance

Additional Resources:

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

MISSION CRITICAL

Frequency: Once per year

BOARD SECRETARY / CLERK CONFERENCE

A two-day conference held once a year that focuses exclusively on the role of the board secretary / clerk. 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.

Frequency: Once

SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE

A 2.5-day conference typically 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](#))
- SDLF District Transparency Certificate of Excellence Checklist ([download](#))
- SDLF High Performing District Checklist ([download](#))

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.