



**California Special
Districts Association**
Districts Stronger Together

2023 BOARD SECRETARY/CLERK CONFERENCE

Premiere Training and Certificate Program™ for Board Secretaries/Clerks

Monterey, CA
November 6-8, 2023



Choose from Two!

Optional Pre-Conference Workshops:

- Tips for Managing the Records Retention Lifecycle
- How to Get Started with a DEIB Program



14 NEW Advanced
Attendee Session Options

Complete the first-time attendee track to earn your certificate

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.



Did You Know?

The Board Secretary/Clerk Conference Qualifies for SDRMA Credit Incentive Points (CIPs)!



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 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 CIP]

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

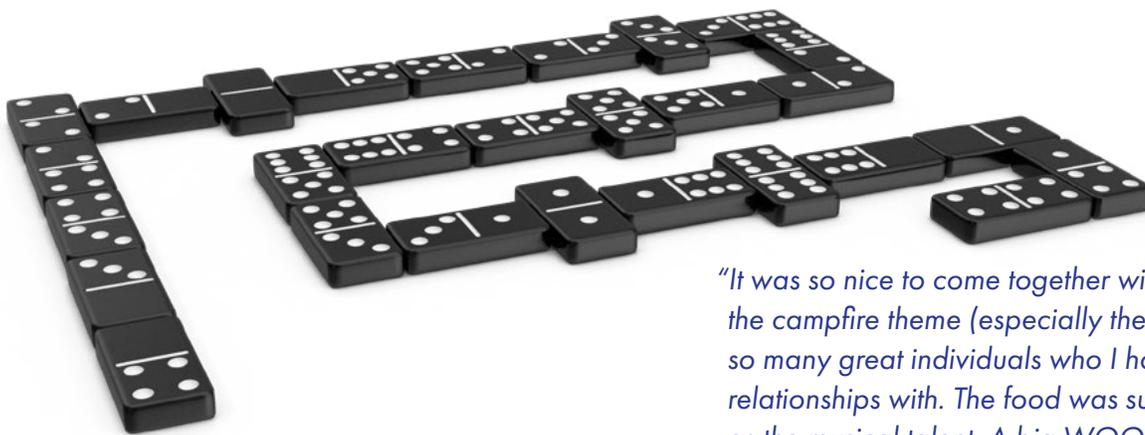
The CSDA Conference beginning November 6, 2023, is eligible for 2 CMC Experience or 2 MMC Professional Contribution points per education day of attendance toward the IIMC designation programs.

DATE & LOCATION
November 6 – 8, 2023

Embassy Suites Monterey Bay Seaside
1441 Canyon Del Rey
Seaside, CA 93955

Room reservations are available at rates starting at \$179 plus tax. The room reservation cut-off is October 5, 2023; however, space is limited and may sell out before this date.

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



"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

SCHEDULE Overview

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! Tips for Managing the Records Retention Lifecycle* OR NEW! How to Get Started with a Diversity, Equity, Inclusion and Belonging Program* 		
4:15 - 5:15 p.m.	CSDA Benefits Trivia <i>(optional)</i>		
5:30 - 7:30 p.m.	Registration and Opening Reception		
Tuesday, November 7, 2023			
	First-Time Attendees	Advanced: Returning Attendees	
7:30 - 8:30 a.m.	Registration		
8:30 - 9:45 a.m.	Opening Keynote "Change Chose Me...Now What?" <i>(All attendees)</i>		
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! FPPC Form 700 and Conflicts of Interest	Advanced: NEW! 'Not My Job' is Not Acceptable: Public Agency Customer Service
12:15 - 1:15 p.m.	Networking Luncheon <i>(All attendees)</i>		
1:30 - 2:45 p.m.	First-Time Attendees: Staying in Compliance <i>(part one)</i>	Advanced: NEW! Get Reacquainted with the Public Records Act and Recent Updates	Advanced: NEW! Where Do I Begin? Building a Strong Data Backup Strategy Step by Step
2:45 - 3:15 p.m.	Break, Networking with the Exhibitors		
3:30 - 5:00 p.m.	First-Time: Advanced Training in the California Public Records Act	Advanced: NEW! Project Management Best Practices: The Key to On-Time and Under-Budget	Advanced: NEW! When the Gavel Strikes: Tips for Efficient and Effective Board Meetings
5:30 - 7:30 p.m.	Reception <i>(All Attendees)</i>		
Wednesday, November 8, 2023			
8:30 - 10:00 a.m.	First-Time: Staying in Compliance <i>(part two)</i>	Advanced: NEW! Recent Legislative Updates to the Brown Act, the Public Records Act, and More	Advanced: NEW! Using Marketing Techniques to Attract and Retain Employees
10:00 - 10:30 a.m.	Break, Networking with the Exhibitors		
10:30 a.m. - 12:00 p.m.	First-Time: Best Practices for Taking & Processing Meeting Minutes	Advanced: NEW! Elections Update: The Status of the California Voting Rights Act	Advanced: NEW! Write for Effortless Reading, Even in Government
12:00 - 1:00 p.m.	Networking Luncheon <i>(All Attendees)</i>		
1:15 - 2:30 p.m.	First-Time: Website Compliance 101: Everything Board Secretaries Need to Know	Advanced: NEW! The Brown Act in a Modern World	Advanced: NEW! Challenging Situations for Board Secretaries and Clerks
2:30 - 2:45 p.m.	Break		
2:45 - 4:00 p.m.	First-Time: Understanding Board Member & District Liability Issues	Advanced: NEW! Your Board Member Resigned . . . Now What?	Advanced: NEW! Practicing Emotional Intelligence

*optional/additional fee, includes lunch

DETAILED SCHEDULE



MONDAY: NOVEMBER 6, 2023
9:00 A.M.– 4:00 P.M.

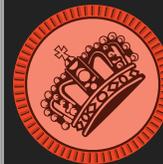
Pre-conference Workshops: \$250 CSDA Members,
\$375 Non-members (*Optional/Additional Fee also includes
lunch – limited space – register early!)

Pre-Conference Workshop

How to Get Started with a DEIB Program*

CPS HR Consulting

This course will provide a comprehensive approach to identifying key components of a well-versed and robust diversity, equity, inclusion and belonging (DEIB) program. Participants will learn how to develop and implement a sustainable program to support diversity, promote a positive culture of inclusion, raise awareness, and diversify collaboration in their workforce.



Pre-Conference Workshop

Tips for Managing the Records Retention Lifecycle*

Best Best & Krieger LLP

There are specific events that can trigger a record's movement to the next phase of the records lifecycle and help to define retention needs and requirements. Examples of these events can include, but are not limited to, expiration of a contract, termination of employment, completion of an audit, and settlement of a legal matter. These events help in determining the value the record continues to bring to the agency, and when to consider the matter "closed" for retention purposes as the value diminishes. Join us to learn about these triggers and how to handle them when they arise.



CSDA *Benefits Trivia*



4:15 – 5:15 P.M.
CSDA Benefits Trivia

There's Nothing Trivial About CSDA Benefits!

True or False:
CSDA has sample meeting agendas online

Choose the right answer:

▶ Yes ▶ No ▶ Maybe
▶ Occasionally

Members receive (a) free car washes (b) car rental discounts

We will be handing out plenty of prizes at this CSDA Trivia Challenge!

TUESDAY: NOVEMBER 7, 2023
8:30 – 9:45 A.M.

Opening Keynote:

“Change Chose Me...Now What?”

Merlyna Valetine

Staying positive in tough times means learning to embrace change. Merlyna’s presentation will teach you that life is more than just what happens to you. How you respond is what matters most. Merlyna teaches you how to live a purposeful life, believe in yourself, embrace change, and succeed in life.

As a well-respected educator for over thirty years, Merlyna Valentine received numerous awards as a teacher, principal, and executive director in a highly successful school district. Her transformational leadership as a school principal resulted in her school being recognized as a “Top Gains” school. Against overwhelming odds, Merlyna Valentine overcame a medical tragedy and thrives in her new life. She has learned some valuable lessons since August 2007, when her life as she knew it was forever changed and she experienced the closest call to death imaginable. Instead of focusing on what happened and what’s missing from her new life as a quad amputee, she chooses to embrace this new path with a grateful heart and positive attitude. Her powerful story of perseverance, courage, and hope was featured on the Today Show and in Ebony magazine. Her message inspires her audiences to live life to the fullest and succeed beyond expectations.



SCHEDULED BREAKOUTS
FIRST-TIME ATTENDEES

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 session 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 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 101: 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 need more information or have 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.

SCHEDULED BREAKOUTS
RETURNING ATTENDEES



FPPC Form 700 and Conflicts of Interest

Fair Political Practices Commission

This seminar will provide general information for public officials and designated employees who must file a Form 700 Statement of Economic Interests. Participants will learn about the relationship between a conflict-of-interest code and the Form 700, filing deadlines, disclosure categories, reporting thresholds and gifts. A detailed overview of how to complete each schedule of the Form 700 will be provided as well. Additionally, this seminar will provide a brief overview of the conflict-of-interest provisions of the Political Reform Act and Government Code Section 1090. Participants will learn to spot and analyze issues, as well as information about seeking informal assistance or formal written advice from FPPC.



'Not My Job' is Not Acceptable: Public Agency Customer Service

Best Best & Krieger LLP

Ask any elected official and they will tell you, constituents matter. In the private sector, customer service is a top priority because unhappy customers tend to purchase less, resulting in revenue loss. In government, bad customer service results in frustration when trying to obtain information. When citizens are frustrated, they sometimes give up on completing important tasks, like filing their taxes or paying their bills, simply because it is too difficult to obtain the necessary information. The government then wastes resources by having to single out these individuals. Strong customer service also builds important community connections, allowing your agency to leverage resources it might not know it has.



Get Reacquainted with the Public Records Act and Recent Updates

Richards Watson Gershon

This session will provide a brief refresher on the Public Records Act, as well as explain recent updates to the Act that every Board Secretary/Clerk should be familiar with. This session will provide a brief summary of the important provisions of the Public Records Act, including the substantive requirements of the Act and the procedure for implementing the Act. In addition, it will explain recent statutory updates to the Act and cases implementing the Act.



Where Do I Begin? Building a Strong Data Backup Strategy Step by Step

VC3

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.



Project Management Best Practices: The Key to On-Time and Under-Budget

Best Best & Krieger LLP

Managing projects can be a big headache sometimes. The challenge can be so large, sometimes it's easier to just "wing it" and hope everything turns out okay. Managers often time spend more time managing the people involved in the project than the project itself. But what if there was a better way? From developing the project business case, to driving decision-making from stakeholders, this session will cover all the skills necessary to ensure your next major project is completed on time and under budget.



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

Richards Watson Gershon

Public meetings influence how your agency is perceived by the public. Meeting management strategies can make board meetings more effective and promote an image of efficiency and transparency. In this session, we share tips for minimizing disruptions, facilitating public participation, and fostering a thoughtful-yet-convivial atmosphere during board meetings.



Recent Legislative Updates to the Brown Act, the Public Records Act, and More

Hanson Bridgett, LLP

This session will discuss recent legislative updates that impact special districts and will be important for board secretaries and clerks to know. It will include updates to the Brown Act, the Public Records Act, the Political Reform Act, and more. The presenters will offer practical recommendations to comply and get your district ready for 2024.

SCHEDULED BREAKOUTS
RETURNING ATTENDEES (continued)



Using Marketing Techniques to Attract and Retain Employees

CPS HR Consulting

You may not associate marketing with Human Resources, but this competency has emerged as an important skill set to attract and retain employees, especially in the public sector. The public sector is not known for selling itself, but in the current labor market successfully telling the story about what your organization does and how you positively impact communities will make a difference in the talent you attract and the satisfaction of your current workforce.



Elections Update: The Status of the California Voting Rights Act

National Demographics Corporation (NDC) and Cole Huber LLP

Special Districts and other jurisdictions continue to receive California Voting Rights Act (CVRA) litigation threats. In Sacramento, there are rumblings of efforts to apply the procedurally burdensome and expensive requirements of the FAIR MAPS Act to special district districting and redistricting.

Presenters will provide an update on Santa Monica's litigation fighting its CVRA lawsuit. They will also discuss how to tell if your District faces legal risk and how to manage that transition, and what challenges face by-division special districts if the FAIR MAPS Act is expanded.



Write for Effortless Reading, Even in Government

CPS HR Consulting

Good writing that leads to effortless reading, even for government communications, can be a reality! Join us for this engaging session on how to make your messages read, understood, and best of all, used. Following the federal and state mandates for writing in plain language, you can craft communications that are clear, concise, and easy to read. With a few tips around wording, structure, and design, your intended audience will walk away with the right message the first time. Avoid the cost of poor communication by applying these techniques which will save you time and frustration.



The Brown Act in a Modern World

Richards Watson Gershon

This presentation will review the following:

- ▶ The Brown Act's new virtual meeting rules, including AB 361, AB 2449, and the Brown Act's traditional teleconferencing options.
- ▶ AB 992's rules for commenting on social media about agency business.
- ▶ Avoiding constitutional issues when monitoring your social media pages.



Challenging Situations for Board Secretaries and Clerks

Prentice Long PC

What do you do when one of your board members is sexually harassing staff? How can you get your board members to attend legally required training? What happens when your board members personally attack each other and engage in bullying behavior? In this session you'll learn what your responsibilities are for ensuring that the elected officials in your agency follow the laws. You'll also learn about practical tools and resources for successfully dealing with elected officials who refuse to comply. And finally, you'll learn about what can legally be done if your attempts to resolve these issues have failed.



Your Board Member Resigned...Now What?

Richards Watson Gershon

Every so often Board Secretaries / Clerks are faced with a Board vacancy. It is important to know and understand there are legal requirements and steps to take when this occurs.



Practicing Emotional Intelligence

CPS HR Consulting

There is strong evidence that emotional intelligence is one of the strongest predictors of performance. Some research states that it is responsible for 58% of your job performance and 90% of top performers have a high EQ. So, getting more EQ is a good thing. Join us for this session to unpack the four quadrants of emotional intelligence and learn what you can do to boost your EQ.

Let the games begin!

Put on your game face at our two evening receptions with your peers and our exhibitors. Games, appetizers, networking, and other special touches to delight our attendees – you won't want to miss these receptions!



WELCOME RECEPTION

Monday, November 6, 5:30 – 7:30 p.m.



RECEPTION

Tuesday, November 7, 5:30 – 7:30 p.m.



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.



Steady as you go.

When your team and ours all pull together, you get the sure-footed stability you need to proceed with confidence. As an extension of your staff, we are always at the sidelines delivering service and expertise. For everything from Workers' Compensation and Property/Liability coverages to Health Benefits options available throughout California, we are here to keep you going strong. For more information, visit sdrma.org.



Maximizing Protection. Minimizing Risk.

800-537-7790 • SDRMA.ORG



CSDA's Special District Board Secretary/Clerk Conference™ • Monterey, CA

Attendee Registration Form

Embassy Suites Monterey Bay Seaside | 1441 Canyon Del Rey | Seaside CA 93955

Three Ways to Register

- 1** ONLINE by visiting the CSDA Annual Conference website at conference.csda.net.
- 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 Thursday, October 5, 2023 <input type="checkbox"/> SDRMA Member* - \$575 <input type="checkbox"/> CSDA Member - \$625 <input type="checkbox"/> Non-member - \$935			
REGULAR REGISTRATION - AFTER Thursday, October 5, 2023 <input type="checkbox"/> SDRMA Member* - \$625 <input type="checkbox"/> CSDA Member - \$675 <input type="checkbox"/> Non-member - \$1,010			
PRE-CONFERENCE WORKSHOPS: <input type="checkbox"/> Tips for Managing the Records Retention Lifecycle* OR <input type="checkbox"/> How to Get Started with a DEIB Program*			
		<input type="checkbox"/> CSDA Member - \$250 <input type="checkbox"/> Non-member - \$375	
			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 – please contact updates@csda.net for access code for SDRMA member pricing

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 October 5, 2023. All cancellations received by this date will be refunded less a \$75 processing fee. There will be no refunds for cancellations made after October 5, 2023. Substitutions are acceptable and must be done in writing no later than October 27, 2023. 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.