



CSDA

California Special
Districts Association

Districts Stronger Together

2023 CSDA annual conference & exhibitor showcase

The Leadership Conference
for Special Districts

📅 August 28 – 31, 2023 | 📍 Monterey, California

The CSDA Annual Conference & Exhibitor Showcase is the one conference that hits all the right notes for special district leaders! Cultivate new connections this August in Monterey.

Join 800-plus special district professionals and industry experts for a three-day, must-attend education and networking event.

- ✍ Develop new partnerships.
- ✍ Discover new products and services to make your district more efficient.
- ✍ Expand your horizons with inspiring and motivating keynote sessions.
- ✍ Learn about the latest in special district technology, management playbooks, and legal trends.
- ✍ Explore new ideas and best practices. Walk away with practical strategies, new connections, and innovative ideas to move your district forward.

We're getting the band back together in Monterey!

CSDA's 2023 Annual Conference & Exhibitor Showcase is back in Monterey! Attendees can enjoy meandering down Cannery Row and Monterey Old Fisherman's Wharf to indulge in a piping hot bread bowl full of clam chowder, visit the acclaimed Monterey Bay Aquarium to see a spirited sea otter up-close, or book a boat tour, whale watching cruise, or fishing trip to set sail on the open waters of Monterey Bay. In your free time, enjoy the combination of natural beauty and cultural richness of Monterey!



Monterey Marriott | Monterey, CA



Portola Hotel & Spa | Monterey, CA

CSDA room reservations in the CSDA room block at the Marriott and Portola Hotel & Spa are available starting at the rate of \$229 plus tax. The room reservation cut-off is August 5, 2023; however, space is limited and may sell out before this date. Information regarding hotel reservations and link to book in the CSDA room block will be emailed to the registrant within 24 hours of registration.

One night's non-refundable room and tax will be charged at the time a reservation is made for rooms reserved at the Portola, and charged on August 5, 2023, for rooms reserved at the Marriott.

Monday, August 28, 2023

pre-conference

Workshops, golf tournament, tours, and more

9:00 a.m. – 3:30 p.m.

Pre-Conference Workshop:

Special District Leadership Academy Module 1: Governance Foundations

 **CIP ELIGIBLE**

As the core curriculum of CSDA's Special District Leadership Academy, this workshop serves as the "foundation" for the series on effective governance of special districts. It is specifically designed for special district board members and meets the requirement for six hours of governance training for Special District Leadership Foundation programs.

\$250 CSDA Member / \$375 Non-member*

**Price includes continental breakfast and lunch.*

9:00 a.m. – 3:30 p.m.

Pre-Conference Workshop

So, You Want to Be a General Manager?

(Part of the SDLF Essential Leadership Skills Certificate Program)

This is a practical career development workshop for senior executives and emerging leaders in special districts. This action-oriented workshop includes group and panel discussions on the journey, roles, and skillsets of a general manager; identifying general manager opportunities; developing positive relations with the board, staff, and peer agency executives; and leadership best practices.

\$100 CSDA Member and Non-member*

Sponsored by the Special District Leadership Foundation (SDLF). Price includes continental breakfast and lunch.



9:00 a.m. Shotgun Start

Pre-Conference Activity SDLF Scramble for Scholarships Golf Tournament

Del Monte Golf Course

Join special district elected officials, staff, and business affiliates at this optional fun event. Great golf skills are not necessary! Proceeds benefit the Special District Leadership Foundation scholarship fund.

\$110 includes golf with cart, lunch, and prizes!

Hurry, space is limited and is on a first-come, first-served basis.

10:30 a.m. – 1:45 p.m.

Pre-Conference Tour

Elkhorn Slough Safari Boat Tour and Moss Landing Harbor District Tour

Playful sea otters, curious harbor seals, boisterous sea lions, and hundreds of bird species abound as you explore one of California's most spectacular wetlands aboard a stable, 27-foot, U.S. Coast Guard inspected pontoon boat in a 1.5-hour tour. Tour of Moss Landing Harbor District to follow.

\$50 per person includes transportation to/from the Convention Center and tour. (Lunch is not included.)

Early registration is encouraged. Limited to 25 attendees.



SDRMA Credit Incentive Points

Special District Risk Management Authority (SDRMA) 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 (CIPs) can be earned based on an agency's attendance at the CSDA Annual Conference & Exhibitor Showcase, reducing SDRMA members' annual contribution amounts.

10:30 a.m. – 3:00 p.m.

 **NEW! Young Professionals
Pre-Conference Tour
Elkhorn Slough Kayak Tour and
Moss Landing Harbor District**

Join your fellow YPs (Young Professional staff and elected officials under the age of 40) for the best way to experience the wildlife and nature of Elkhorn Slough, via kayak. The 1.5-hour kayak tour will take you to visit sea otters, harbor seals and birds up close. The tour of Moss Landing Harbor District will follow. End your pre-conference day networking with your fellow YPs over appetizers and drinks.

\$90 per person, includes transportation to/from the Convention Center, kayak excursion, and post-tour happy hour.

Early registration is encouraged. Limited to 25 attendees. Due to safety, the max weight is 250 lbs.

1:30 – 3:30 p.m.

**Certified Special District Manager
(CSDM) Exam, Special District
Leadership Foundation**

(optional, must be scheduled prior to conference)

3:45 – 5:15 p.m.

Chapter Roundtable Discussion

(optional, no fee but must be attending the conference)

Join CSDA board members and local chapter leaders from across the state to share best practices and discuss issues and opportunities.



Calling all Young Professional District Staff, age 40 and younger! Keep an eye out for special sessions and a pre-conference tour especially suited for you. These sessions are noted with a YP icon.

Conference Officially BEGINS!

5:15 – 7:30 p.m.

**President's Reception
with the Exhibitors**

(all registered attendees welcome)

Join us in the exhibit hall as we network with business professionals who provide all types of goods and services to special districts. Appetizers, refreshments, and entertainment are provided.

08.29 - 08.31 schedule

This conference hits all the right notes!

Tuesday, August 29, 2023

7:30 – 8:30 a.m.

CSDA Board Meeting

7:30 a.m. – 6:30 p.m.

Exhibitor Showcase Open

7:30 – 8:30 a.m.

Continental Breakfast in the Exhibit Hall

Breakfast is included in full conference registration.

8:45 – 10:45 a.m.

Opening General Session and Keynote



Seth Mattison
*CEO and Founder of
FutureSight Labs*

**"The Heart of Leadership:
The Secret & Science to
Influencing & Leading During
Transformation"**

Leadership has always been about one thing: influence. To effectively manage transformation today, leaders must have the understanding and the skill to not only connect with the rational and logical aspects of people's brains but also have the capacity to reach their hearts to understand what ultimately drives human behavior at the deepest level.

In this highly interactive deep-dive discussion, leadership keynote speaker Seth Mattison will add a new perspective to the conversation of leadership today by dissecting the most critical skills and competencies leaders will need to acquire to elevate their impact on the teams they're supporting, the organizations they're leading, and the communities they live in.



Awards Presented:

- ▶ General Manager of the Year
- ▶ Board Member of the Year

- ▶ Staff Member of the Year
- ▶ SDLF New and Renewing Certified Special District Managers
- ▶ SDLF Essential Leadership Skills Certificate

11:00 a.m. – 12:00 p.m.

Scheduled Breakout Sessions

ABCs of Alternative Delivery Models for Capital Improvement Projects (CIPs)

Melanie Mow Schumacher, Soquel Creek Water District

With alternative delivery models being used more frequently for capital improvement projects (CIPs), it's important to know the pros/cons between various procurement methods. Design-build (DB) construction is a delivery method that provides an owner (special district) a single point of contact for both the design and construction phase of the project. Unlike traditional design-bid-build (DBB), the phases overlap, and team members (owner and DB firm) collaborate throughout the process to provide successful project delivery.

Public Agencies' Role in Forest Management and Keys to Successful Grant Applications

Joel Metzger, Utica Water and Power Authority
Andy Fecko, Placer County Water Agency
Mark Egbert, Georgetown Divide and El Dorado Resource Conservation Districts

As landscape-scale forest management becomes increasingly important to protect our communities, water supplies, and timberlands, public agencies have a unique opportunity to take leading roles in being good stewards of our natural resources. Hear from public agency managers who are on the cutting edge of forest management in California, learn about their ongoing projects, and find out how they worked with stakeholders. Local, state, and federal grants / appropriations are critical to public agencies' ability to move forest management projects forward, and the panel will identify preferred funding sources and share

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the keys to successful grant applications. If a public agency in your community is ready to take on a forest management project, you don't want to miss this panel!

Role of the Board, Parliamentary Procedure, Brown Act, and Conflicts of Interest

Oliver Yee, Liebert Cassidy Whitmore

The board has significant fiduciary responsibilities and duties, much of which is guided by the law. This session will cover the essential legal functions and foundational principles surrounding board governance. Specifically, it will cover key provisions of the Brown Act, ethical responsibilities, conflicts of interest, and parliamentary procedures.

Save Money and Time with Programmatic Environmental Impact Reports (EIRs)

Tom Kennedy and Malik Tamimi, Rainbow Municipal Water District

CEQA compliance adds a great deal of time and money to every project. With rapidly aging infrastructure every pipeline will need work sooner or later. Rather than performing a separate CEQA action every time, Rainbow MWD decided to perform a Programmatic EIR (PEIR) to cover every pipeline in the district. Though this process took a bit longer, by evaluating nearly 400 miles of pipeline all at once, over 75% of water and over 90% of sewer pipelines are now fully covered by the action. The remaining pipelines are also covered with pre-defined monitoring and mitigation steps. Attendees will learn how to perform a systemwide PEIR, the cost and time benefits of a systemwide PEIR, and how future projects can be incorporated into the

PEIR via addendums.

Practicing Emotional Intelligence

Sylvette Wake, 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 job performance and 90% of top performers have a high EQ. So, getting more EQ is a good thing. Join us to learn about the four quadrants of emotional intelligence and what you can do to boost your EQ.

Required Ethics AB 1234 Compliance Training (Part 1)*

Richard D. Pio Roda and Alex J. Mog, Meyers Nave

AB 1234 mandates agency officials receive two hours of ethics training every two years. This training covers all required topics, including conflicts, financial gain, prerequisites of office, transparency, and fair process.**

**Must attend both sessions to receive your digital certificate.*

***This presentation has been approved for 2 hours of MCLE credit by the State Bar of California. Meyers Nave, a Professional Law Corporation, is a MCLE licensed provider. PN #10416*

LAFCOs – An Additional Resource for Special Districts

Joe Serrano, Santa Cruz LAFCO

Where does a district go to change its jurisdictional boundaries? Who determines when a new district is formed? The answer is the Local Area Formation of Counties (LAFCO). By the end of this session, not only will you understand the synergy between special districts and LAFCOs but you will leave as a LAFCO expert.

12:15 – 1:30 p.m.

Lunch with the Exhibitors

Lunch is included in the full conference registration.

All conference attendees are welcome to attend lunch in the exhibit hall. Enjoy your lunch while taking time to learn more about our exhibitors and the valuable services they provide. From risk management to accounting, HR, legal, banking services, and more – our exhibitors have some of the best of what you're looking for!



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1:45 – 3:00 p.m.

Scheduled Breakout Sessions

How CUPCCAA Benefits Special Districts in Delivering Public Works Projects

Will Clemens, Oceano Community Services District

The California Uniform Public Construction Cost Accounting Act provides special districts with the ability to implement alternative bidding procedures on public works projects costing less than \$200,000. The Act is voluntary and supports participating special districts with efficient and flexible project delivery. This session will cover key provisions of the act, benefits of participation and how to opt into the Act, pitfalls to avoid, and recent updates.

Public Events to Build Community Equity

Joshua Bonner, Coachella Valley Public Cemetery District
Victoria Llort, Coachella Valley Water District
CV Strategies

Community equity has never been more important, as districts are increasingly responsible for solving some of the most pressing local issues in your neighborhood. Events and public gatherings can be an important component of your district's communication and public engagement plan. As an interactive experience, events allow your district to engage the community on a positive footing, building your district's image beyond just the service(s) you offer. Learn how to engage the community, build your brand, and recognize valuable partnership opportunities that exist within your community. Use your next event to move from a special district no one understands to a trusted community partner with an interest in giving back.

 **Great for Young Professionals!**

You Can (Central) Bank On It: The Importance and Impact of the Federal Reserve System to Your District's Investment Program

Brent Turner, California CLASS

How much do you really know about how the Federal Reserve works? While we have all seen "the Fed" in the news, how do its decisions impact the economy and the investor? In this session, attendees will gain a fuller understanding of the role that the Federal Reserve System plays in managing the nation's money supply, influencing the economy, and serving as a lender of last

resort. This session is meant to demystify a subject that is often presented and discussed in unnecessarily incomprehensible jargon, so if you are curious to learn more about the Federal Reserve and monetary policy in plain-English terms, please consider attending.

The Brown Act in a Modern World

Chelsea Straus, 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

What's All the Buzz About? How Partnerships Fuel Drone Innovation

Joshua Metz and Sophia Selivanoff, Regional Government Services
Chris Bley, Insight Up Solutions
Becca Fenwick, UCSC CITRIS Institute for Drone Education & Research

Come see what all the buzz is about with this budding industry before it takes off! We're on the cusp of a workforce transformation - and Monterey Bay, industry, governments, and academia have joined forces to chart a path for drones and robotics to automate work while strengthening community. A panel of leaders will share their lessons learned on strategic coalitions and working across organizations and sectors to craft a common vision for the future.

Required Ethics AB1234 Compliance Training (Part 2)*

Richard D. Pio Roda and Alex J. Mog, Meyers Nave

See previous session description.

**Must attend both sessions to receive your digital certificate.*

Hearings, Protests and Elections, Oh My! Implementing a Property-Related Fee

Kevin King, Reclamation District No. 1000
Eric Grotenhuis, Page Design
Greg Ghironzi, NBS

Aging infrastructure and increasing costs of service are common problems for many local agencies and the procedural challenges presented by Prop. 218 for property-related fees can be daunting. With a thoughtful approach to fee setting and

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implementation, funding for operation, maintenance and capital needs is possible to achieve. This session will discuss considerations for the fee-setting process, the approval procedure to include both the hearing and election steps, and public outreach efforts exemplified using a case study of Reclamation District No. 1000's stormwater fee.

3:45 – 4:45 p.m.

Scheduled Breakout Sessions

Leadership of Management

*Robert Gutierrez, Rainbow Municipal Water District
Steve Hernandez, WaterWisePro Training LLC*

Understanding the critical differences between leadership and management is an essential tool in efficiently operating any organization. Management is a form of control, while leadership is a form of influence. Persons in positions of authority need help to understand the dynamics of these two styles, impacting their ability to get the most out of their staff. This session will explore the concepts of servant leadership and how to leverage this leadership style to increase production, morale, and the willingness to stay with the organization.

 **Great for Young Professionals!**

Pricing Debt: Interest Rates, Fees, and Other Variables

*Consultants of CSDA Finance Corporation
Don Bartz, Phelan Pinon Hills Community Services District*

When an agency considers financing, interest rates are often the first concern and can vary based on several factors. In this interactive panel discussion, CSDA Finance Corporation consultants explain how financings are priced and interest rates are set in both the bond market and the bank placement market. We'll be joined by a special district general manager who will share insight into the financing process and the importance of communicating to board officials each step of the way.

How to Recruit When No One Knows What You Do

*Kylie Sun, Tripepi Smith
Cathy Thompson, Tripepi Smith (TS) Talent Solutions*

Many agencies are finding it difficult to not only keep employees engaged, but to find new, motivated talent to join their team. The challenge of finding new

employees increases when it isn't clear what exactly your organization does or what it values. Finding qualified candidates goes hand in hand with your ability to clearly communicate your organization's mission, culture, expectations, and responsibilities.

Presenters will share their tips and tricks for creating a seamless and successful recruiting process that educates the public on your organization and brings in top talent prospects.

Embracing Diversity, Equity, Inclusion, and Belonging as The Cultural Norm

Kniceita V. Bullock, UKG

Implementing Diversity, Equity, Inclusion, and Belonging (DEI&B) initiatives today isn't just the right thing to do. It's a business imperative that positively impacts the workforce and drives employee retention and engagement. To attract and retain talent in the post-pandemic world of work, governmental organizations need to move beyond DEI&B checkboxes and create inclusive cultures where employees feel valued and know they belong. This session will show you how to assess your organization's DEI&B progress, facilitate real organizational change through honest dialogue, and enable true inclusivity. Most importantly, you'll learn how to build a DEI&B practice that lasts.

Privacy and the Need to Share Information in the Workplace

Ryan Quadrel and Rob Cutbirth, Slovak Baron Empey Murphy & Pinkney LLP

Employees regularly provide confidential, personal health information (PHI) to employers and claims administrators through the onboarding process, requests for leaves of absence (LOA) or disability accommodation, and in response to workers' compensation claims. PHI might then be stored, shared, and used by Human Resources, Benefits, Risk Management, Claims Administrators, and others. Even with good intentions, such acts (and omissions) may create risk exposures in terms of statutory privacy violations, may harm or negate your ability to best manage LOA/disability accommodation requests, or result in a loss of defense to claims.



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Avoiding Conflicts of Interest and Maintaining Public Trust

Alex J. Mog, Meyers Nave

Maintaining public trust is critical to successfully serving as a public official. Conflicts of interest, both real and perceived, are a quick way for public officials to lose that trust. This session will provide an explanation of the requirements of SB 1439, which establishes significant new conflict of interest rules regarding campaign contributions, as well as tips for maintaining public trust.

This presentation has been approved for 1 hour of MCLE credit by the State Bar of California. Meyers Nave, a Professional Law Corporation, is a MCLE licensed provider. PN #10416

Learn How to Make Your Website Accessible Before a Costly Lawsuit Forces You

*Martin Rauch, Rauch Communication Consultants, Inc.
Mac Clemmens, Streamline*

State and federal laws and a growing number of legal judgments are pushing special districts to make their websites, media, and documents accessible to people with disabilities. If you don't know if your district's website and documents are Americans With Disabilities Act (ADA) compliant, they probably are not. And it could cost your district up to \$4,000 per day in fines. Join us at this fast-paced session where you will learn what is web and document accessibility and how it affects members of your district, why your district should care, and guidance on how your district can get and stay compliant.

5:00 – 6:30 p.m.

Mix and Mingle in the Exhibit Hall

(all registered attendees welcome)

Stop by the exhibit hall for a drink and hors d'oeuvres. Be sure to enter for one more chance to win one of our fabulous prizes!

*The exhibit hall closes on
Tuesday, August 29th at 6:30 p.m.*



Wednesday, August 30, 2023

8:00 – 8:30 a.m.

SDRMA Sponsored Full Plated Breakfast

All registered attendees and exhibitors are welcome.

Breakfast is included in full conference registration.



8:30 – 10:30 a.m.

General Session Keynote



Matthew Luhn

*Formerly with Pixar, Story Artist,
Creativity Expert & Author*

Storytelling for Business

Storytelling is the #1 business skill necessary to connect, motivate, and lead people in today's world. Stories compel us to engage in experiences, learn lessons, and define our values and ourselves within our organization. Matthew Luhn, a 20-year Pixar story veteran, brings his experience creating and developing 10 blockbuster films at Pixar and provides practical strategies that teach and inspire people and teams to connect more effectively with audiences

on an emotional level. Matthew uses the power of storytelling to bridge the gap between business and heart, driving your story toward one unforgettable selling point.



Awards Presented:

- ▶ SDRMA Awards
- ▶ SDLF New and Renewing Transparency Certificate of Excellence
- ▶ SDLF New and Renewing District of Distinction

10:45 a.m. – 12:00 p.m.

Scheduled Breakout Sessions

Understanding Board Member Liability

*Peter Glaessner, Esq., Allen, Glaessner,
Hazelwood & Werth
Debbie Yokota, Special District Risk
Management Authority*

The goal of this presentation is to provide current and newly elected or appointed board members with a working understanding of the role of an elected official in the day-to-day governance of district operations. Public board members are covered by Public Officials Errors & Omissions policies. This session will inform board members what activities and actions are and are not covered by this policy.

The California Public Records Act: Don't Get Caught Unaware!

Sarah Lustig, Atkinson, Andelson, Loya, Ruud & Romo

It is imperative that public agencies know how to respond to and comply with requests for records under the California Public Records Act (CPRA). This session will provide an overview of the CPRA, including deadlines and methods for responding and a discussion of exemptions and statutory objections. It will also highlight trending legal developments surrounding the California Public Records Act and give tips and advice for responding to requests.

Blueprint for a Changing Workplace

Terri Bianco, CPS HR Consulting

Never has there been a better opportunity to create positive changes in your workplace. Everyone in your organization was affected by recent external events. No one is the same as they were before. People have adapted to working from home. They have become more independent, flexible, and more productive. Now it will change again and keep changing. As a

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manager or supervisor, you are in a position to plan, to guide, and to influence the success of a new work culture. But how? This class offers ideas, processes, techniques, and behaviors to move things along in the right direction from the get-go.

Current IRS Audits Focused on Special District Issues

Judith Boyette and Mikaela Habib, Hanson Bridgett, LLP

This session will be focused on current increased IRS audits and compliance reviews dealing with areas that are of concern to California special districts. These IRS actions create the risk of potential large monetary penalties for special districts, as well as risk of damage to the public's perception of the special district.

Difficult Conversations - Ethics Complaints Against a Board Member

Steven Miller, Hanson Bridgett, LLP

Few issues are as sensitive and difficult as how to handle a complaint lodged against a sitting board member. Such a complaint usually raises legal challenges for an agency as well as political and emotional challenges for board members and staff. Maintaining internal cohesion and public trust can be extremely difficult. The process is often shrouded in secrecy, without the transparency often necessary to learn any meaningful lessons. Learn some best practices and identify key issues from an experienced ethics investigator and advisor. This session will explore how to address key legal issues and protect the agency, what an agency's goals should be, and how to establish protocols for the greatest chance of success.

What to Expect from Your Finance Department

Cindy Byerrum, Eide Bailly CPAs

Paul Kaymark, Nigro & Nigro PC

Larry McKenney, Amador Water Agency

This interactive session will help demystify the mysteries of the accounting and auditing world. A special district finance director will walk through what leadership should expect from the finance department, when to expect it, and talk about typical compliance reports expected from your finance professionals and common issues found with each.

10 Best Practices Every Board Member Should Know

Brent Ives, BHI Management Consulting

This session will cover:

- ▶ What correlates as critically important to boards.
- ▶ What are the most difficult aspects of working with the board?
- ▶ What are the most challenging issues of working with your GM and staff?
- ▶ What practices have you learned about being productive in the public environment?
- ▶ What have you learned about yourself in this job?

11:00 a.m. – 12:00 p.m.

SDLF Board and Annual Meeting

12:15 – 2:00 p.m.

Legislative Update Luncheon

(All attendees welcome)

CSDA's legislative and legal affairs team will present attendees with the most up-to-date information on the outcome of the biggest state and federal budgetary, legislative, and legal issues impacting special districts in 2023, as well as a sneak peek of what to expect in 2024. Learn about significant new laws coming your way and what they mean for special districts going forward.



Awards Presented:

- ▶ Innovative Project/Program of the Year Award (large district)
- ▶ Innovative Project/Program of the Year Award (small district)
- ▶ Exceptional Public Outreach & Advocacy Award (large district)
- ▶ Exceptional Public Outreach & Advocacy Award (small district)
- ▶ Recognition of Previous and Outgoing Board Members
- ▶ Ralph Heim Exceptional Outreach & Advocacy Award
- ▶ William Hollingsworth Award of Excellence

Lunch is included in the conference registration.

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2:15 – 3:30 p.m.

CSDA Finance Corporation Board and Annual Meeting

2:15 – 3:30 p.m.

Scheduled Breakout Sessions

Cal/OSHA Requirements Made Simple

Enriqueta (Henri) Castro, CSP, Special District Risk Management Authority

While the ultimate goal of Cal/OSHA is to protect employees, we recognize how challenging it is to figure out which of the many Cal/OSHA regulations may apply to your district. There are regulations that apply to all employers, there are some that require written programs, there are those that apply only if there is an "occupational exposure", the list goes on and on. During this session we'll focus on Cal/OSHA regulations that commonly apply to special districts. We'll review the requirements based on operations and employee exposures, and then we'll review a step-by-step approach on how to break down the requirements to help simplify implementation. Participants will receive tools to easily navigate the requirements of 20 common regulations, as well as implementation guidance.

Cybersecurity Best Practices for Special Districts

Corey Kaufman, VC3

With ransomware attacks threatening local governments more than any other industry—even more than schools or healthcare organizations—a perfect storm exists as local governments are also often the least-equipped to handle a cyberattack. Many local governments do not even have the "basic basics" in place such as multi-factor authentication (MFA), endpoint detection and response (EDR), and data backup. We will answer the question, "Where do I begin with cybersecurity?" and present a checklist that distills tips, best practices, and recommendations that organizations can use to score themselves, find cybersecurity gaps, and create an action plan.

Surplus Land Act and Special Districts: Know the Impact

*Larry J. Kosmont, Kosmont Financial Services
Matt Cody, Best Best & Krieger LLP*

California is faced with a housing crisis. The State has revved up enforcement to accelerate the

production of affordable housing including the use of public agency-owned land. Effective in 2020, the Surplus Land Act (SLA) requires ALL public agencies including special districts to follow a process to sell or lease any public property by first offering it to a state-controlled list of affordable housing developers. The State Department of Housing & Community Development manages the process and now has an enforcement unit to ensure compliance. Learn how the SLA process will impact re-use of district properties and how to navigate the sale/lease/licensing of special district public agency property.

Leading a Values-Based Organizational Culture

Sean Barclay, Tahoe City Public Utility District

Creating alignment around a shared set of values at an organizational level requires so much more than just adopting a "set of words on a wall." This session will examine one district's journey towards implementing a set of shared values and behaviors that guide decision-making, from strategic planning to everyday customer interactions. The session will share actual experiences along the way towards implementation, including the challenges and real benefits realized over time. Come learn firsthand from our mistakes and successes and take-home practical tips to help you understand if a values-based organizational culture is the right fit for your district.

 Great for Young Professionals!

A Step-by-Step Guide to Building an Effective Multi-Year Strategic Plan

Martin Rauch, Rauch Communication Consultants, Inc

Whatever the challenges facing your district, it is critical to build a realistic and well-supported plan to get there. Whether your district has an existing planning process or is looking to start one for the first time, this session will provide proven methods for evaluating the issues, challenges, and opportunities facing your district, and developing clear and practical direction for the future. It will distinguish the roles of the board and staff in the process. This lively session will also feature sharing of experiences (good and bad) by the participants and presenter, and practical tips that you can bring home. We will also explore how to successfully engage the board, executive team, staff, and public in this process.

Skilled and Trained Workforce: When is it Triggered and What Are My Agency's Responsibilities?

Deborah Wilder, Contractor Compliance and Monitoring, Inc.

Skilled and Trained Workforce (STW) requirements now attach to 15 different types of projects from school lease back contracts to design build contracts of one million dollars or more. As more and more construction projects include STW requirements, join us for an educational session to determine if and when your project will be subject to STW, what the agency's obligation is to monitor and collect monthly reports, and when progress payments should be withheld. Finally, learn the requirements for mandatory reporting of non-compliant contractors to the Department of Industrial Relations.

Sexual Harassment Prevention (Part 1)*

Victoria Danna, Best Best & Krieger LLP

This training satisfies California Assembly Bills 1825, 2053, and 1661 biannual requirements. This training applies to supervisory and private business professionals with 50 or more employees, as well as elected officials. Attendees will learn what constitutes sexual harassment and discrimination in the workplace, how to recognize and prevent harassment, what procedures to follow if you witness harassment or are harassed yourself, the potential consequences of harassment, and a discussion about gender identity and gender expression in the workplace, in compliance with Senate Bill 396.

**Must attend both sessions to receive your digital certificate.*

3:45 – 5:00 p.m.

Scheduled Breakout Sessions

Reserves: What Every Board Member, General Manager, Finance Staff AND Taxpayer Should Know

Tom Scaglione, Grossmont Healthcare District

This interactive session will explore real reserve policies from a variety of California special districts to consider policy provisions worthy of imitation and those to avoid. We'll discuss the foundation provided by California law and industry guidelines and discover how to write a policy that doesn't sound like it was written by an accounting nerd. As stewards of the people's money, we need to communicate effectively on how our reserve

policies meet the unique financial and operational objectives of each district. Participate in this important session and gain the confidence you need to know what reserve policy is best for your district and your customers.

Building an Effective Board Management Team – Here's How

Martin Rauch, Rauch Communication Consultants, Inc.

This session will provide best practices, review case studies, and allow participants to discuss strategies for building an effective board and management team. You will take home ideas for change and improvement, including how to evaluate whether to have committee meetings and if so, how to structure them; how to ensure your board is focusing on the right information and issues; how to provide clear policy direction to the manager; and how to develop a pain-free and productive method for evaluating the manager's performance.

Sexual Harassment Prevention (Part 2)*

Victoria Danna, Best Best & Krieger LLP

See previous session description.

**Must attend both sessions to receive your digital certificate.*

Understanding CEQA's Requirements Regarding Tribal Cultural Resources and AB 52 Tribal Consultation

Amy Hoyt and Sarah Owsowitz, Best Best & Krieger LLP

The California Environmental Quality Act ("CEQA") requires lead agencies to analyze a project's potentially significant impacts on Tribal Cultural Resources. And before releasing any negative declaration, mitigated declaration or environmental impact report to the public, CEQA requires lead agencies to invite any California Native American tribe, who has previously submitted a written request, to consult with the lead agency pursuant to AB 52. AB 52 consultation recognizes that California Native American Tribes have valuable expertise regarding their tribal history and practices that should be considered when studying potentially significant impacts on Tribal Cultural Resources.

This session will discuss CEQA's requirements regarding analysis of Tribal Cultural Resources, including requirements regarding AB 52 consultation.

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

Craig Steele, 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.



6:00 – 9:00 p.m.

Taste of the City

(all registered attendees welcome)

The Dueling Pianos are back to take your requests while you dance the night away, sample local food and beverages, and enjoy a silent auction.



9:00 – 11:00 p.m.

Karaoke After Party

Let's keep the party going... Join us for the ultimate Taste of the City After Party! Belt out your favorite tunes as we let loose to celebrate a great Annual Conference!

\$25 includes admission and 2 drinks. All proceeds support the Special District Leadership Foundation.*



Contracting Do's and Don'ts: Public Works, Services, Materials, Supplies, and Equipment

Gary Bell, Colantuono Highsmith & Whitley, PC

All special districts contract for services, materials, supplies, and equipment and frequently public works, too. There are different procedures in principal acts and other provisions of state law for each, required policies for some, and pitfalls if procedures aren't followed. This session will distinguish between the different types of procurement, discuss the rules that apply to each, and provide practical advice for board members and staff regarding these processes.

5:00 – 6:00 p.m.

SDRMA Member Reception

Light appetizers and drinks will be served.

Electronic Invitation to SDRMA Members to follow – approximately one month prior to the event.

Thursday, August 31, 2023

8:00 – 10:00 a.m.

Closing Breakfast: Connect and Collaborate

We've saved the best for last! Join us for a unique and valuable opportunity to spend time with your special district peers, discuss issues unique to your particular district type, trade ideas and best practices, and listen to one another's stories. Continental breakfast will also be provided. It's the perfect way to wrap up the Annual Conference!



Awards Presented:

- ▶ Excellence in Technology
- ▶ Chapter of the Year
- ▶ Beacon Awards

10:00 a.m.

Conference Adjourns





Attendee Registration Form

Hotel Reservations *Marriott and Portola Hotel & Spa*

CSDA room reservations within the CSDA Room Block for the Annual Conference and Exhibitor Showcase are available at the Marriott and Portola Hotel & Spa starting at the rate of \$229 plus tax. The room reservation cut-off is August 5, 2023; however, space is limited and may sell out before this date. Information regarding hotel reservations and links to book in the CSDA room block will be emailed to the attendee only (not the individual registering the attendee) within 24 hours of registration.

Full Conference Registration Fees Include:

- President's Reception with the Exhibitors
- Keynote Sessions
- Continental Breakfast with the Exhibitors
- Lunch with the Exhibitors
- Mix and Mingle in the Exhibit Hall
- SDRMA Full Plated Breakfast
- Legislative Update Luncheon
- All Breakout Sessions
- "Taste of the City" Reception
- Closing Breakfast

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. (All faxed 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).

Name:		Title:	
District:			
Address:			
City:		State:	Zip:
Phone:		Fax:	
Email:		Website:	
Special Needs (include dietary):			
Emergency Contact:			
Conference Registration Fees		Early Bird (on/before August 5, 2023)	Regular (after August 5, 2023)
<input type="checkbox"/> CSDA Member - Full Conference		\$ 675.00	\$750.00
<input type="checkbox"/> Non-member - Full Conference		\$ 1,010.00	\$ 1,125.00
<input type="checkbox"/> Guest of a Member - Full Conference (Cannot be from a district/company) <input type="checkbox"/> Vegetarian		\$ 350.00	\$ 425.00
<input type="checkbox"/> Guest of a Non-member - Full Conference (Cannot be from a district/company) <input type="checkbox"/> Vegetarian		\$ 525.00	\$ 635.00
<input type="checkbox"/> CSDA Member - One-day registration <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday		\$ 375.00 each day	\$ 400.00 each day
<input type="checkbox"/> Non-member - One-day registration <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday		\$ 560.00 each day	\$ 600.00 each day
Separate Registration Fees		Member	Non-member
<input type="checkbox"/> Pre-Conference Workshop: SDLA Module 1: Governance Foundations - Aug. 28		\$ 250.00	\$ 375.00
<input type="checkbox"/> Pre-Conference Workshop: So, You Want to Be a General Manager? - Aug. 28		\$ 100.00 CSDA Member/Non-member	
<input type="checkbox"/> SDLF Scramble for Scholarships Golf Tournament - Aug. 28		\$ 110.00 (includes lunch)	
<input type="checkbox"/> Pre-Conference Tour: Elkhorn Slough Safari Boat Tour and Moss Landing Harbor District Tour - Aug. 28		\$ 50.00 CSDA Member/Non-member	
<input type="checkbox"/> Young Professionals Pre-Conference Tour: Elkhorn Slough Kayak Tour and Moss Landing Harbor District - Aug. 28		\$ 90.00 CSDA Member/Non-member	
<input type="checkbox"/> "Taste of the City" Reception (Guests only) - Aug. 30		\$ 80.00	\$ 120.00
<input type="checkbox"/> Karaoke After Party - Aug. 30		\$ 25.00 CSDA Member/Non-member	
		TOTAL	
Payment Information			
Payment type: <input type="checkbox"/> Check <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> AMEX <input type="checkbox"/> Discover			
Account name:		Account Number:	
Expiration date:	CVC:	Authorized Signature:	

Cancellations/Substitution Policy: Cancellations must be in writing and received by CSDA no later than Saturday, August 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 August 5, 2023. Substitutions are acceptable and must be done in writing no later than August 18, 2023 at 5:00 p.m. Please submit any cancellation notice or substitution request to jennifers@csda.net or fax to 916-520-2465.

Consent to Use Photographic Images: Registration and attendance at, or participation in, CSDA meeting and other activities constitutes an agreement by the registrant to 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.

Anti-Discrimination and Harassment Policy: CSDA is dedicated to a harassment-free event experience for everyone. Our Anti-Discrimination and Harassment Policy can be found under "CSDA Transparency" at www.csda.net/about-csda/who-we-are.



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