



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

# 2022 BOARD SECRETARY/CLERK CONFERENCE

*Premiere Training and Certificate Program™ for Board Secretaries/Clerks*

**November 7–9, 2022**  
**Seaside, CA**

**+** **Advanced Courses Available for  
Returning Certificate Holders!**

**2** **Optional Pre-Conference Workshops:**

- **Business Writing for Board Secretaries**
- **Problem Solving for the Modern  
Leader – Creative vs. Critical Thinking**



**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.

CSDA created this certificate program 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. Whether you are a new or seasoned board secretary/clerk, continuing education is essential to keeping current on the many aspects of your job.

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.



### DATE & LOCATION

**November 7 – 9, 2022**

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

Room reservations are available at rates starting at \$169 plus tax. The room reservation cut-off is October 7, 2022; however, space is limited and may sell out before this date. Information regarding hotel reservations and the link to book in the CSDA room block will be emailed to the attendee within 24 hours of registration.



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 7, 2022, is eligible for 1 CMC Experience or 1 MMC Professional Contribution point per education day of attendance toward the IIMC designation programs.

**Monday, November 7, 2022**

8:00 a.m.	Pre-Conference Workshop Registration *optional/additional fee
9:00 a.m. - 4:00 p.m.	PRE-CONFERENCE WORKSHOPS: <ul style="list-style-type: none"> <li>NEW! Business Writing for Board Secretaries* OR</li> <li>NEW! Problem Solving for the Modern Leader – Creative vs. Critical Thinking*</li> </ul>
4:15 - 5:00 p.m.	CSDA B-I-N-G-O ( <i>optional</i> )
5:30 - 7:30 p.m.	Registration and Opening Reception

**Tuesday, November 8, 2022**

	First-Time Attendees	Advanced: Returning Attendees	
7:30 - 8:30 a.m.	Registration		
8:30 - 9:45 a.m.	Opening Keynote: “Being Extraordinary: It’s An Inside Job”		
9:45 - 10:15 a.m.	Break and Networking with the Exhibitors		
10:15 a.m. - 12:00 p.m.	First-Time: ADA Compliance and Transparency 101: What Board Secretaries Need to Know	Advanced: NEW! Effective Tips for Giving and Receiving Feedback	Advanced: NEW! Challenging Situations for Board Secretaries and Clerks
12:00 - 1:00 p.m.	Lunch Break (All attendees)		
1:15 - 2:45 p.m.	First-Time Attendees: Best Practices for Taking and Processing Meeting Minutes	Advanced: NEW! How to Get Your Board On Board - A Guide to Board Member Orientations	Advanced: NEW! Get Reacquainted with the Public Records Act and Recent Updates
2:45 - 3:15 p.m.	Break, Networking with the Exhibitors		
3:30 - 5:00 p.m.	First-Time: Staying in Compliance: Understanding Fundamental Special District Laws	Advanced: NEW! The Engineering of Public Records Processing	Advanced: NEW! Special District Website Requirements & ADA Compliance Refresher
5:30 - 7:30 p.m.	Reception		

**Wednesday, November 9, 2022**

8:30 - 10:00 a.m.	First-Time: Board Secretary / Clerk Foundations	Advanced: NEW! How to Create Sustainable DEI Change	Advanced: NEW! Tools and Technologies for the Modern Clerk
10:00 - 10:30 a.m.	Break and Networking with the Exhibitors		
10:30 a.m. - 12:00 p.m.	First-Time: Board Secretary / Clerk Foundations (continued)	Advanced: NEW! Setting Your Agency Up for Success: Building Goals and Priorities	Advanced: NEW! A Board Secretary/ Clerk's Guide to Building Your District's Brand
12:00 - 1:00 p.m.	Lunch ( <i>All Attendees</i> )		
1:15 - 2:30 p.m.	First-Time: Advanced Training in the California Public Records Act	Advanced: NEW! Connection Conundrum – How to Re-Establish Connections in a Virtual or Hybrid Environment	Advanced: NEW! Core Policies and Procedures You Should Have at Your District
2:30 - 2:45 p.m.	Break		
2:45 - 4:00 p.m.	First-Time: Understanding Board Member & District Liability Issues	Advanced: NEW! Keeping Up with the Law! Elections, FPPC, Brown Act, and MORE	Advanced: NEW! Into the Tsunami: The California Voting Rights Act, Redistricting, and Board Elections
4:00 p.m.	Event Adjourns ( <i>Graduation Certificate Distribution</i> )		



**MONDAY: NOVEMBER 7, 2022**

**9:00 AM– 4:00 PM**

**Pre-conference Workshops: \$225 CSDA Members, \$340 Non-members** (\*Optional/Additional Fee also includes lunch – limited space – register early!)

## Pre-Conference Workshop

### Business Writing for Board Secretaries\*

*CPS HR Consulting*

This session is designed for the busy professional who wants to learn specific writing strategies for quickly creating easy-to-read documents. The class will emphasize the essential qualities of successful business writing:

- ▶ Clear, concise messages
- ▶ Appropriate tone
- ▶ Effective style and usage
- ▶ Logical organization

#### **AT THE END OF THIS CLASS, YOU WILL BE ABLE TO:**

- ▶ Consider your reader and your purpose when writing
- ▶ Use effective organizing techniques: topic sentences, paragraph structure
- ▶ Use plain language: clear, concise, specific
- ▶ Use appropriate tone in business documents and correspondence
- ▶ Practice good writing style and usage

## Pre-Conference Workshop

### Problem Solving for the Modern Leader – Creative vs. Critical Thinking\*

*Best Best & Krieger LLP*

Problem-solving is the act of defining a problem; determining the cause of the problem; identifying, prioritizing, and selecting alternatives for a solution; and implementing a solution. On the surface, it appears to be a very straightforward, almost scientific, task. Perfect for critical thinkers. But what happens when science fails to find a viable solution? What happens when the person responsible for the solution looks at things less critically and more creatively? While we often think of creativity as an inherent trait, anyone—whether they're an undiscovered artist or by-the-book government professional—can learn how to be more creative. In this session, participants will explore the differences between critical and creative thinking, examine ways to learn creativity and discover how to be more creative both on an individual basis and in a team setting. We will discuss the importance and power of creativity, go over the barriers to creativity, and show some behaviors and techniques that can help you generate novel ideas

*...continued*





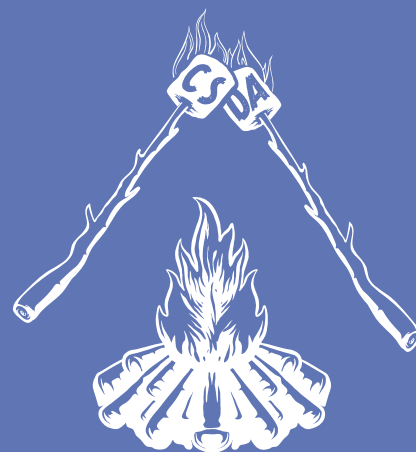
*continued...*

or solutions to problems, as an individual. We will also examine the best critical thinking strategies, and practice applying the right strategy, to today's problems.

#### **PARTICIPANTS WILL BE BETTER PREPARED TO:**

- ▶ Approach problems using structured methods of gathering observations, breaking cognitive fixedness, and generating creative ideas for solutions
- ▶ Apply creative solutions and behavior-change analysis to innovation development and internal team processes
- ▶ Avoid haphazard decision-making
- ▶ Evaluate multiple alternatives both critically and creatively, to achieve effective results

*\*Optional/Additional Fee also includes lunch – limited space – register early!*



## **S'MORE FUN!**

Hike on over to two evening 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.



### **WELCOME RECEPTION**

**MONDAY, NOVEMBER 7, 5:30 – 7:30 PM**



### **RECEPTION**

**TUESDAY, NOVEMBER 8, 5:30 – 7:30 PM**

**4:15 – 5:00 PM**

## **CSDA Benefits B-I-N-G-O**

We love maximizing the benefits we offer. You love winning prizes! Let's all do what we love at the Board Secretary / Clerk Conference! We start with an exploration of membership benefits to make sure your district is taking full advantage of all we provide. Along the way, you'll win prizes!

#### **REASONS TO ATTEND:**

- ▶ We mentioned prizes, right?
- ▶ Learn how to navigate our website & community portal so you can quickly access resources
- ▶ Explore CSDA value-added benefits that may save your district money!
- ▶ BINGO is for everyone! Members & Non-members all benefit
- ▶ Meet new peers! This activity has a way of bringing people together because it's fun!

**TUESDAY: NOVEMBER 8, 2022****8:30 – 9:45 AM****Opening Keynote:****“Being Extraordinary: It’s An Inside Job”***Ayanna Castro*

Are you listening to your intuition when faced with tough decisions? Are you surrounding yourself with people who encourage you to be extraordinary? Do you have a plan for where you want to go and what you want to do? External influences can make you feel like you need to do - and be - more, when you already have everything inside of you to be extraordinary. In this session, Ayanna will share strategies on how to embrace being the “total package” by:

- ▶ Listening to the “Little Birdie” – Following your intuition to make better decisions
- ▶ Having a Personal Board of Directors – Surrounding yourself with people who push you to do better
- ▶ Managing Your 168 – Recognizing what’s really keeping you from doing what needs to be done
- ▶ Creating a Mind-Mapped Action Plan – See your goals in a different way to create a better strategy for success

Ayanna Castro is an international speaker, life coach, and author with expertise in empowering others to realize their potential and overcome self-imposed obstacles in pursuit of their goals. As the Founder and Chief Maven of Work Your Package™, her mission is to encourage and equip others to enhance what they already have to become the “total package” and be extraordinary.

Known for her perfect balance of guidance, support, and hard truths, she is the “go-to” person for those embarking on new ventures or who have lost clarity on their goals.



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

### **ADA Compliance and Transparency 101: What Board Secretaries Need to Know**

*Streamline and 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, Derek from Cole Huber LLP and Mac from Streamline 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 have more information or questions.

### **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 directors' 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 minute; but rather, it describes problems the presenter has encountered while working as a municipal clerk.

### **Staying in Compliance: Understanding Fundamental Special District Laws**

*Meyers Nave*

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.

### **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.

### **Advanced Training in the California Public Records Act**

*Richards Watson Gershon*

Every Board Secretary / Clerk needs 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.

### **Understanding Board Member and District Liability**

*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 session 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**



## **Effective Tips for Giving and Receiving Feedback**

*CPS HR Consulting*

Giving and receiving feedback is an essential part of managing others' performance. Feedback should be meaningful. That sounds easy but giving constructive feedback can be uncomfortable—and it's even possible to go wrong with positive comments.

In this session, we'll discuss strategies for giving feedback. We'll also talk about how we can learn to be more receptive and less defensive when someone gives us feedback about our own performance or behavior.



## **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 trainings? 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.



## **How to Get Your Board On Board: A Guide to Board Member Orientations**

*Panel Discussion*

Join your fellow special district board secretaries and clerks for a discussion on best practices in orienting newly elected representatives in their role as a decision-maker and leader for a special district. Learn from others to hear what did and did not work from their experience. Also, learn what to share and when to inform without overwhelming a newly elected official.



## **Get Reacquainted with the Public Records Act and Recent Updates**

*Richards Watson Gershon*

This session will provide a 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.

### **OUTCOMES WILL INCLUDE:**

- ▶ Reacquainting Board Secretaries/Clerks with the requirements of the Public Records Act.
- ▶ Understanding how to implement the Public Records Act.
- ▶ Informing Board Secretaries/Clerks on the latest updates to the Public Records Act.



## **The Engineering of Public Records Processing**

*Best Best & Krieger LLP*

When an agency receives a public records request, a statutory set of wheels are put in motion. During this session, participants will learn best practices for each step of this process, starting with how to encourage requesters to narrow the subject of their request. Additionally, attendees will get familiar with Electronically Stored Information (ESI) and will learn how to search for, review, and produce ESI – including e-mails, text messages, video, and audio files – in response to PRA requests.



## **Special District Website Requirements & ADA Compliance Refresher**

*Cole Huber LLP, Streamline*

OK, so you're pretty confident that you're compliant, but wouldn't it be nice to know for sure? Join Derek from Cole Huber LLP and Mac from Streamline, who will quickly through everything you need to know to stay compliant in California, especially when it comes to serving users with disabilities on your website—which has become increasingly complex in the past year. You'll leave with a checklist and learn where to go if you have more information or questions.



## **How to Create Sustainable DEI Change**

*CPS HR Consulting*

High-performing organizations are not only focusing on the diversity of their workforce, but also on how that workforce reflects a culture of equity and inclusion. Inclusion addresses how well the organization shares power, access, and resources with all elements of the workforce, particularly those elements which represent marginalized and/or underrepresented groups of the organization. This session will discuss effective ways to become more



inclusive through operationalizing DEI into every business unit of the organization.

### **NEW** Tools and Technologies for the Modern Clerk

*Richards Watson Gershon*

With the professional landscape changing so rapidly in recent years, many clerks have been forced to implement new tools and technologies to continue providing great service to their customers, both internal and external. This shift has provided opportunities for clerks to explore and implement solutions that will not only help them provide service immediately but impact the efficiency of the clerk's office long into the future. This session will explore available technologies to address the challenges of the "now" normal, including agenda management, digital signatures, workflows, electronic plan submittal, records management portals, online meetings, and remote workspaces, among others.

#### **PARTICIPANTS WILL**

- ▶ Leave with a better understanding of the technologies available to them
- ▶ Understand why evolving technologies are important to organizational efficiency
- ▶ Be better prepared to advocate for improved technology investments

### **NEW** Setting Your Agency Up for Success: Building Goals and Priorities

*Tripepi Smith*

As new issues and challenges arise every day, agencies may find themselves shifting and changing policies, processes, service delivery and more. To set themselves on the right track, these agencies would benefit from reestablishing organizational goals, narrowing their focus on priorities and reviewing the progress made on current goals. By doing so effectively, agencies can identify areas for improvement and make significant progress towards success and growth.

In this session, Tripepi Smith President Ryder Todd Smith will reflect on his experiences in public service and in assisting agencies with processes to:

- ▶ Consider the purpose and benefits of establishing goals for agency staff and the communities they serve
- ▶ Review how to remain effective in the goal-setting process

- ▶ Discuss accountability and goal measurement practices
- ▶ Analyze how building goals can impact the agency's culture

### **NEW** A Board Secretary/Clerk's Guide to Building Your District's Brand

*Verdin Marketing*

Good communication is the key to building strong relationships with your district stakeholders, partners, and the communities you serve. To communicate most effectively, a district should understand their brand messages and tailor their communications to the different audiences.

This session will cover the Why's and How's of building a district brand, giving takeaways for high-level understanding and tactics you can implement today, including:

- ▶ Branding, telling your district's story, distilling talking points, targeting messaging, and more.

### **NEW** Connection Conundrum How to Re-Establish Connections in a Virtual or Hybrid Environment

*Best Best & Krieger LLP*

Re-establishing relationships is often seen as secondary to the technical nature of running public agencies. But people are the heart of any organization, and even more so in organizations that serve the public. The pandemic caused us to move from hour-long in-person meetings to condensed half-hour Zoom calls – and virtual everything. In 2022, leaders need to be more deliberate about creating opportunities for deeper connections within their agencies or they may risk employees going deeper into silos. Organizations must instill a culture of listening, understanding, and inspiring employees to feel more connected.

#### **IN THIS SESSION, LEADERS WILL:**

- ▶ Identify signs of disconnect
- ▶ Create a greater understanding of the value of strong relationships in the public workspace
- ▶ Develop strategies for building back relationships that may have become strained during the pandemic
- ▶ Strengthen existing relationships to create more productive and satisfying work environments

## **NEW** Core Policies and Procedures You Should Have at Your District

*Richards Watson Gershon*

Instructors will discuss the fundamentals of essential policies and procedures you should have at your district. Participants will learn how to draft, implement, and enforce core policies and procedures. This session is geared toward developing new, and improving existing, policies and procedures. The instructors are unable to offer substantive legal advice as to any particular area of the law and are not able to provide feedback on whether existing policies comply with applicable statutes.

## **NEW** Keeping Up with the Law! Elections, FPPC, Brown Act, and MORE

*Slovak Baron Empey Murphy & Pinkney LLP*

In this breakout session, we will discuss new laws impacting special districts following the 2022 legislative session. We invite you to participate in our review, analysis and summary of the latest legislation and developments in the law related to election requirements, conflicts of interest, the Brown Act and the impact these developments will have on your district. We will offer practical recommendations for compliance and board management to help you stay in compliance and get ready for 2023.

## **NEW** Into the Tsunami The California Voting Rights Act, Redistricting and Board Elections

*National Demographics Corporation (NDC) and  
Tripepi Smith*

The California Voting Rights Act is forcing special district boards across the state into by-division elections. Learn from two experts and your fellow conference attendees how to tell if your district faces legal risk and how to manage that transition if/when it happens.



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's Special District Board Secretary/Clerk Conference™

Monterey, CA: November 7–9, 2022

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

**REGISTER ONLINE AT:**

**[https://www.csda.net/boardsecretary/home?](https://www.csda.net/boardsecretary/home?ga=2.2433328.1424424569.1660754400-1840185133.1642475017)**  
**[ga=2.2433328.1424424569.1660754400-1840185133.1642475017](https://www.csda.net/boardsecretary/home?ga=2.2433328.1424424569.1660754400-1840185133.1642475017)**

## Conference Registration Form

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: ☐ YES ☐ NO

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

EARLY BIRD REGISTRATION - ON OR BEFORE FRIDAY, OCTOBER 7, 2022 SDRMA Member - \$550 ☐ CSDA Member - \$600 ☐ Non-member - \$900

REGULAR REGISTRATION - AFTER FRIDAY, OCTOBER 7, 2022 SDRMA Member - \$625 ☐ CSDA Member - \$675 ☐ Non-member - \$1,010

PRE-CONFERENCE WORKSHOPS: ☐ Business Writing for Board Secretaries\* **OR** ☐ Problem-Solving for the Modern Leader – Creative vs. Critical Thinking\*

☐ 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  
1112 I Street, Suite 200  
Sacramento, CA 95814  
Fax: 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 7, 2022. All cancellations received by this date will be refunded less a \$75 processing fee. There will be no refunds for cancellations made after October 7, 2022. Substitutions are acceptable and must be done in writing no later than October 28, 2022. Please submit any cancellation notice or substitution request to [meganh@csda.net](mailto: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 to 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](http://www.csda.net/about-csda/who-we-are).





## 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](http://sdrma.org).

