



**California Special
Districts Association**
Districts Stronger Together

*All New Content
Including Keynotes
& Breakout Session
Options!*



CSDA's 2024
**GENERAL
MANAGER
LEADERSHIP
SUMMIT**



*A leadership conference for general managers
and other management staff of special districts*

June 23–25, 2024 
JW Marriott Anaheim Resort

The General Manager Leadership Summit provides the best networking and professional development opportunities for special district general managers and other management staff from districts of all types and sizes throughout California.

Come together with others facing the same challenges and opportunities, learn from our expert instructors, and return to your district refreshed and reenergized.

Consider sending an emerging leader from your district to this conference also – it could be the first step in preparing our next generation of special district general managers.

**THE CONFERENCE
FOR CURRENT &
EMERGING
LEADERS**



**SCHOLARSHIPS
AVAILABLE!**
visit sdlf.org

**OTHERS WHO WOULD BENEFIT
FROM ATTENDING:**

- DISTRICT ADMINISTRATORS
- DEPARTMENT MANAGERS
- OPERATIONS MANAGERS
- OFFICE MANAGERS
- SUPERVISORS
- FINANCE OFFICERS
- BUSINESS MANAGERS
- LEGAL COUNSEL
- OTHER DISTRICT MANAGEMENT STAFF



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 can be earned based on an agency's attendance at the General Manager Leadership Summit.



The General Manager Leadership Summit qualifies for 25 points of continuing education toward the Special District Leadership Foundation's Certified Special District Manager program. Learn more about the requirements for taking the CSDM examination on page 9.



The variety of breakout session topics provide valuable education and relevant resources for all types and sizes of special districts.”

– PETE KAMPA, CSDM, GROVELAND COMMUNITY SERVICE DISTRICT

at a glance
SCHEDULE



Pre-conference workshops held on Sunday, June 23 are not included with full registration. They require separate registration and are offered at an additional cost. Detailed information on pre-conference workshops can be found on page 5.

SUNDAY, JUNE 23, 2024

8:30 a.m.–3:30 p.m.	Pre-Conference Workshop: So, You Want to Be A General Manager? <i>(separate registration and payment required)</i>
11:00 a.m.–3:30 p.m.	Pre-Conference Workshop II: Passing the Torch: How to Recruit, Engage and Carry Your Dream Team Forward <i>(separate registration and payment required)</i>
1:00–3:00 p.m.	Certified Special District Manager (CSDM) Exam: Optional, Must be Scheduled Prior to Conference
3:45–5:15 p.m.	Speed Networking

SUMMIT OFFICIALLY BEGINS SUNDAY EVENING

5:30–7:00 p.m.	Welcome Reception and Registration
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MONDAY, JUNE 24, 2024

8:00 a.m.	Conference Registration Opens
8:00–8:30 a.m.	Continental Breakfast with the Exhibitors
8:30–10:00 a.m.	OPENING KEYNOTE: The Future of Leadership
10:00–10:30 a.m.	Break: Networking with the Exhibitors
10:30 a.m.–12:00 p.m.	BREAKOUT OPTIONS: Leadership Lessons from Your Peers - Collaboration and Transformation; Navigating Funding Strategies for Capital Projects; Better District Leadership Through a Productive Partnership Between the Manager and Board
12:15–1:30 p.m.	Networking Lunch with the Exhibitors
1:30–3:00 p.m.	BREAKOUT OPTIONS: Leading a Values-Based Organizational Culture; Cybersecurity and IT Strategy for Special District Leaders; Navigating Legal Landmines: Essential Updates for Special District General Managers
3:00–3:45 p.m.	Break and Networking with the Exhibitors
3:45–5:00 p.m.	BREAKOUT OPTIONS: Money Market Securities and Joint Powers Authority Pools; Thriving Together: Navigating Community Engagement in the Fast Lane; How to be a More Strategic Thinker
5:15–6:45 p.m.	Food & Wine Experience Reception

TUESDAY, JUNE 25, 2024

8:30–9:00 a.m.	Continental Breakfast with the Exhibitors
9:00–10:30 a.m.	GENERAL SESSION WITH KEYNOTE: Bridge the Gap
10:30–11:00 a.m.	Break: Networking with the Exhibitors
11:00 a.m.–12:15 p.m.	BREAKOUT OPTIONS: Let’s Invite Attention: It’s Time to Stop Flying Below the Radar and Tell Your District’s Story; Harnessing AI: Strategies for Productivity and Protection for Special Districts; Stellar Public Sector Customer Service
12:30–2:30 p.m.	CLOSING LUNCH: Special Districts Face an Existential Threat in CA as NSDC Works to Define Them in DC
2:30 p.m.	Conference Adjourns

“Great event with very informative speakers!”

– Sandy Raffelson, General Manager,
Herlong Public Utility District



LOCATION

Anaheim, CA



JW MARRIOTT ANAHEIM RESORT

1775 S Clementine Street
Anaheim, CA 92802

CSDA room reservations in the CSDA room block start at the rate of \$209 plus tax and fees per day. The room reservation cut-off is May 31, 2024; 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 within 24 hours of registration.



LOCATION

The JW Marriott Anaheim Resort is located in the heart of Anaheim and a short drive from iconic beaches. You are at the center of all that makes Southern California such a beloved destination. JW Marriott Anaheim Resort puts you at Disneyland® Resort's doorstep, just a short walk from its gates. World-class shopping, dining, and entertainment are all nearby while sporting and cultural venues connect you to the local scene.



BRING A GUEST!

Guest Fee (cannot be from a district or a company that does business with districts): Includes Welcome Reception, Continental Breakfast on Monday and Tuesday, and Food & Wine Experience on Monday.

For guest pricing options, please refer to Registration Fees below.

Not sure if you are a member? Contact the CSDA office at 877-924-2732 to find out if your agency or company is already a member. To learn more about the many benefits of CSDA membership contact Member Services at membership@csda.net or 877-924-2732.

REGISTRATION FEES

EARLY BIRD (on or before May 31, 2024):

Member	\$775
Non-member	\$1,110
Guest of a CSDA Member*	\$285
Guest of a Non-member*	\$415

Regular (after May 31, 2024):

Member	\$860
Non-member	\$1,240
Guest of a CSDA Member*	\$375
Guest of a Non-member*	\$540

ADDITIONAL COST WORKSHOPS**

Pre-conference workshop - two options!

So, You Want to Be a GM?	\$115 Member/Non-member
Passing the Torch: How to Recruit, Engage, and Carry Your Dream Team Forward	\$285 Member/\$430 Non-member



Need help paying for this conference? Check out available scholarships at SDLF.org. There is no district budget limit and you don't need to be a CSDA member.

* Cannot be from a district or company that does business with districts.

**Separate registration and payment required. Space is limited and on a first-come, first-served basis.

PRE-CON

Two Pre-Conference Workshops and Networking

Sunday, June 23, 2024

Pre-Conference Workshops - Two options!



8:30 a.m.–3:30 p.m.

Pre-Conference Workshop: So, You Want to Be a General Manager?

Scott Carroll, CSDM, Costa Mesa Sanitary District

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 skill sets of a general manager; identifying general manager opportunities; developing positive relationships with the board, staff, and peer agency executives; and leadership best practices.

Includes continental breakfast and buffet-style lunch.



NEW!

11:00 a.m.–3:30 p.m.

Pre-Conference Workshop II: Passing the Torch: How to Recruit, Engage, and Carry Your Dream Team Forward

Christine Sliz, Regional Government Services Authority
Gabe Lanusse, Greater Vallejo Recreation District
Ryder Todd Smith, Tripepi Smith

In October 2021, 3 million adults took early retirement in the U.S. Many agencies were caught flat-footed after losing organizational talent and district knowledge about history, processes, and decisions. Innovative recruitment, engagement and succession planning processes can reignite the energy in your organization. In this two-part workshop, we will address the foundation of every agency's success: innovative recruitment and succession planning.

PART ONE: Building Your A-Team

PART TWO: Passing the Torch without Burning Your Fingers

Includes buffet-style lunch.

Networking



3:45–5:15 p.m.

Speed Networking

Come and enjoy lively and fun speed rounds of networking and prizes and learn about CSDA business affiliate members that can save your district time and money - or both!

Limited space, so register now! Limited to special district staff and board members only.



1:00–3:00 p.m.

Certified Special District Manager (CSDM) Exam

Optional, must be scheduled prior to conference.

Separate registration and payment required for pre-conference workshops.

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

Welcome Reception - Conference Begins!



5:30–7:00 p.m.

WELCOME RECEPTION AND REGISTRATION – IT'S AN MVP PARTY!

Join us for a spirited celebration as we honor our Most Valuable Partners (MVPs) at our themed reception! Embrace the team spirit by donning your favorite sports jersey as we recognize and appreciate the invaluable contributions of our partners. It's a winning combination of recognition, camaraderie, and fun!

MONDAY

Training & Networking Opportunities

Monday, June 24, 2024

8:00 a.m.

Conference Registration Opens

8:00 – 8:30 a.m.

Continental Breakfast with the Exhibitors



8:30 – 10:00 a.m.

Opening Keynote

Sponsored by



The Future of Leadership

John Spence, Global Business Expert, Coach, Trainer, Speaker

Some fundamentals of leadership will never change. Honesty, integrity, courage, fairness, vision, and a handful of other elements are essential to being a successful leader. However, as the speed of change accelerates, it demands that leadership evolve to keep pace. To successfully navigate tomorrow's business challenges, you must increase the leadership and management capabilities of your existing leaders and ensure the readiness of your top talent to move to their next role.

10:00 – 10:30 a.m.

Break and Networking with the Exhibitors

10:30 a.m. - 12:00 p.m.

BREAKOUT SESSION OPTIONS

Leadership Lessons from Your Peers - Collaboration and Transformation

Leah Harris, San Miguel Consolidated Fire Protection District

Ian Prichard, Calleguas Municipal Water District

This breakout session will help show you how to lead an organization through a collaborative approach with a department-wide organizational skillset that will change how governing bodies, management, and staff work together as a team with the same vision. From there, you can plan for the transformation of your organization through strategic plan implementation as a process of change. This will create a work culture that is measurably more productive and brings joy back into public service.

Navigating Funding Strategies for Capital Projects

Dmitry Semenov, Ridgeline Municipal Strategies, LLC

Tom Neisler, Tehachapi-Cummings County Water District

Rick Brandis, Brandis Tallman, A Division of Oppenheimer & Co., Inc.

Project financing can be a daunting task. Recent market turbulence and California's budget deficit make it even more complicated and may require adjustments to the financing plan. In this session, we discuss funding strategies available to special districts for infrastructure and facility projects. We will also discuss the management of financing in a higher interest rate environment. A market update will be provided because even though we may not always know what the future holds, we should always know where we stand right now.

Better District Leadership Through a Productive Partnership Between the Manager and Board

Martin Rauch, Rauch Communication Consultants, Inc.

This session recognizes the crucial importance of maintaining the best relationship between the manager and the board. It will provide tips on defining roles and relationships, building an effective team between the board and manager, helping your board fulfill its role, maintaining communication over time, executing a useful performance evaluation, and much more. This interactive session will also provide real-life examples, and opportunities for questions, answers, and discussion.

12:15 – 1:30 p.m.

Networking Lunch with the Exhibitors

“The GM Leadership Summit is our go-to venue in the development of our management staff, enabling and inspiring them to continuously increase their competencies and advance in the district.”

—PETE KAMPA, CSDM, GROVELAND COMMUNITY SERVICES DISTRICT



1:30 – 3:00 p.m.

BREAKOUT SESSION OPTIONS

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 toward implementation, the challenges, and the 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.

Cybersecurity and IT Strategy for Special District Leaders

Corey Kaufman, VC3

In this session, we will outline the necessary items to build out an effective IT strategic plan. This will include addressing the following items:

- What is required to build an IT Strategic Plan
- Identifying the goals of the local government agency
- How to identify the current risks and build a realistic plan to remediate those risks
- How does this impact the budget
- How to make sure that we have executed the plan we put together.

Navigating Legal Landmines: Essential Updates for Special District General Managers

David Boyer and Suparna Jain, Atkinson, Andelson, Loya, Ruud & Romo

In the dynamic landscape of special districts, staying abreast of legal updates is essential. As stewards of public resources tasked with ensuring the smooth operation of their districts, General Managers must keep up with the latest legal developments to mitigate risks and ensure compliance. This presentation will offer a comprehensive overview of essential legal updates tailored specifically to the needs of General Managers and special districts.

3:00 – 3:45 p.m.

Break and Networking with the Exhibitors

3:45 – 5:00 p.m.

BREAKOUT SESSION OPTIONS

Money Market Securities and Joint Powers Authority Pools

Bob Shull, California CLASS

The investment portfolio is one of the only areas where state and local governments can generate income without charging taxes or fees to the citizenry. With rates rising last year, interest income has become a more relevant and valuable revenue source. Drawing from real-life success stories, this session will provide insights into the key components of an effective investment plan including cash flow analysis, portfolio diversification, and effective investment and risk management strategies.

Thriving Together: Navigating Community Engagement in the Fast Lane

Hilary Straus, Citrus Heights Water District

Josh Nelson, Best Best & Krieger LLP

Melanie Mow Schumacher, Soquel Creek Water District

Ashley Metzger, Regional Government Services Authority

As a leader, guiding and supporting organizational change is part of your daily life. So how can you best manage yourself and others through these changes? Adopting an Agile Mindset is one fundamental approach. This presentation explains what an Agile Mindset is, how critical it is for leaders of an organization, and some of the associated leadership behaviors essential for achieving success.

How to be a More Strategic Thinker

John Spence

Your strategic plan is essentially a decision-making tool. How will you allocate your scarce resources? What markets will you serve? What products and projects are priorities? Every critical decision you make is tested for alignment with the plan. This is why organizations take the strategic planning process so seriously, and they should. There is a computer programming term: GI=GO. Garbage In; GO= Garbage Out. It is much the same with strategic planning. If the thinking that goes into the planning process is flawed, your plan will be too. Therefore, the leaders in your organization must be superior strategic thinkers.

5:15 - 6:45 p.m.

FOOD & WINE EXPERIENCE RECEPTION



Join your fellow attendees and exhibitors for more networking while enjoying food, wine, and beer sampling.

Sponsored by



TUESDAY

Training & Networking Opportunities

Tuesday, June 25, 2024

8:30 – 9:00 a.m.

Continental Breakfast with the Exhibitors



9:00 – 10:30 a.m.

General Session Keynote

Sponsored by



Bridge the Gap

Jennifer Edwards, Best-Selling Author, Keynote Speaker, Coach

Let's face it, many conversations can go sideways. Many of us feel "squeezed" in these polarizing, cancel-culture times, and shocking data shows that this tension is seeping into the workplace and costing organizations millions.

How can we engage optimally with people, especially if they hold different perspectives, values, and beliefs... and sometimes seem to be on a "whole other planet?" In a fast-paced, reactive, and noisy world, listening and speaking the truth has become more complicated than ever. The quality of our conversations has never been more important. It is time to level up. Participants will leave with 5 practical skills to help them communicate and collaborate better with anyone, anywhere, anytime.

10:30 – 11:00 a.m.

Break and Networking with the Exhibitors

11:00 a.m. – 12:15 p.m.

BREAKOUT SESSION OPTIONS

Let's Invite Attention: It's Time to Stop Flying Below the Radar and Tell Your District's Story

Rachel Murphy, Contra Costa Water District
Ryder Todd Smith, Tripepi Smith

Developing a brand, marketing strategy and comprehensive communication plan is a wise investment to increase presence in the community and build trust. There are foundational steps needed to have an agency-wide brand platform to which marketing goals, objectives, and tactics are tied. Brand development for public agencies is foundational to raising awareness, increasing trust enhancing communications, and elevating connections with customers and key audiences.

Harnessing AI: Strategies for Productivity and Protection for Special Districts

Mac Clemmens, Streamline
Nick Clair, Lozano Smith, Attorneys at Law

In an era where Artificial Intelligence (AI) is set to transform the public sector, this presentation explores the transformative potential of AI for special districts. We delve into practical applications that promise to significantly boost productivity, from automating tasks for general managers and district staff to revolutionizing how districts do business. This session will highlight both the unprecedented opportunities and the legal and ethical challenges they present, such as data privacy, bias, and security risks. Attendees will come away equipped with actionable strategies to harness AI's potential responsibly while safeguarding against its pitfalls.

Stellar Public Sector Customer Service

Emanuela Tala, Liebert Cassidy Whitmore

The session will cover an expansive myriad of pressing issues. The following issues: Public Sector Responsibility and Accountability; Public Sector Transparency; and Public Perception of Public Sector Employment.

- Deep dives into the Public Sector Customer Service
- Deep dives into the Public Service Standards of Conduct
- Deep dives into the Implicit Bias.

“The timing of the GM Summit is perfect. Falling at the conclusion of the fiscal year, you can reflect on the past year while picking up tools for the upcoming year in a forum with other special district leaders.”

— RYAN CLAUSNITZER, CSDM, GENERAL MANAGER, ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT



12:30–2:30 p.m.

Closing Lunch: Special Districts Face an Existential Threat in CA as NSDC Works to Define Them in DC

Kyle Packham, CSDA

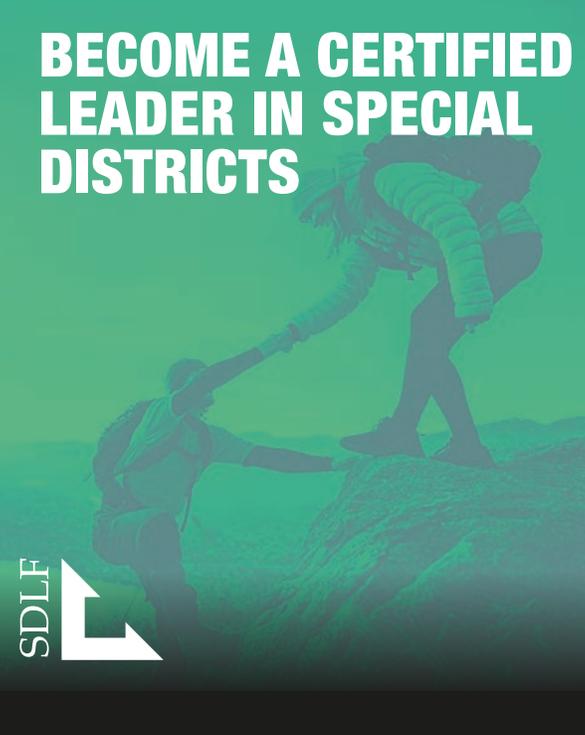
Aaron Avery, CSDA

2024 could be the most important year for advocacy yet, with a statewide ballot measure to revise the Constitution threatening severe, retroactive invalidation of special district revenue and rejection of local control over our essential services. Meanwhile, in Washington, the National Special Districts Coalition, of which CSDA is a founding member, is pressing forward with an effort to define special districts in federal law and ensure districts receive equitable access to federal grants. All that, and a run-down of the hottest bills and budget proposals facing special districts, including ERAF property tax shifts, development impact fee restrictions, Surplus Land Act guidelines, zero emissions vehicle mandates, labor laws, and more.

2:30 p.m.

Event Adjourns

BECOME A CERTIFIED LEADER IN SPECIAL DISTRICTS



Need Help Paying for this Conference?
Scholarship funds are available from the Special District Leadership Foundation (SDLF). There is no district budget limit and you do not need to be a CSDA member to receive funds. Apply at www.sdlf.org.

CERTIFIED SPECIAL DISTRICT MANAGER (CSDM)

A PROGRAM FOR GENERAL MANAGERS AND OTHER MANAGEMENT POSITIONS

Certified Special District Manager (CSDM) is a voluntary designation sought by individuals who strive to be the best in their field. Administrators with various academic and professional backgrounds can be candidates for the program.

The certification examination and study guide were developed through the participation of over 100 volunteer subject matter experts who know about special district management. Guided by the SDLF Board, Certification and Audit Advisory Committee, and under direction by a professional examination development firm, this certification gives successful candidates recognition unmatched by any other program.

The two-hour exam covers all key aspects of special district management including governance, legal requirements, policy development, ethics in public service, strategic planning, public finance, and more. To find out the requirements for taking the Certified Special District Manager (CSDM) examination visit www.sdlf.org or call 916-231-2939.

The General Manager Leadership Summit qualifies for 25 hours of continuing education toward CSDM.



SIGN-UP

Attendee
Registration Form

Anaheim, CA

Three Ways to Register

- 1. ONLINE** by visiting the General Manager Leadership Summit at gmsummit.csda.net.
- 2. FAX:** 916-520-2465, All faxed registration forms must include credit card payment.
- 3. MAIL:** CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. Please include registration form and payment. Check should be made payable to: California Special Districts Association.

Name:		Title:	
District:			
Address:			
City:		State:	Zip:
Phone:		Email:	
<input type="checkbox"/> CSDA Member <input type="checkbox"/> Non-member			
Is this your first year attending the General Manager Leadership Summit? <input type="checkbox"/> Yes <input type="checkbox"/> No			
SUMMIT REGISTRATION FEES			
EARLY BIRD PRICE (ON OR BEFORE MAY 31)		REGULAR PRICE (AFTER MAY 31)	
<input type="checkbox"/> CSDA Member	\$775	<input type="checkbox"/> CSDA Member	\$860
<input type="checkbox"/> Non-member	\$1,110	<input type="checkbox"/> Non-member	\$1,240
<input type="checkbox"/> Guest of a CSDA Member*	\$285	<input type="checkbox"/> Guest of a CSDA Member*	\$375
<input type="checkbox"/> Guest of a Non-member*	\$415	<input type="checkbox"/> Guest of a Non-member*	\$540
		Subtotal	
PRE-CONFERENCE REGISTRATION FEES			
MEMBER		NON-MEMBER	
<input type="checkbox"/> So, You Want to Be a GM? Workshop	\$115	<input type="checkbox"/> So, You Want to Be a GM? Workshop	\$115
<input type="checkbox"/> Passing the Torch Workshop	\$285	<input type="checkbox"/> Passing the Torch Workshop	\$430
<input type="checkbox"/> Speed Networking (district attendee)	\$0	<input type="checkbox"/> Speed Networking (district attendee)	\$0
		Total \$	
PAYMENT			
<input type="checkbox"/> Check <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover <input type="checkbox"/> American Express			
Acct. Name:		Acct. Number:	
Expiration Date:	CVC:	Zip:	Authorized Signature:
SPECIAL NEEDS - INCLUDING DIETARY			
<input type="checkbox"/> Vegetarian <input type="checkbox"/> Other:			
Emergency Contact - Name & Phone:			
<small>*Guests cannot be from a special district or someone who does business with a special district. Cancellations/Substitution Policy: Cancellations must be in writing and received by CSDA no later than May 31, 2024. All cancellations received by this date will be refunded less a \$75 processing fee. There will be no refunds for cancellations made after May 31, 2024. Substitutions are acceptable and must be done in writing no later June 14, 2024. Please submit any cancellation notice or substitution request to meganh@csda.net or fax to 916-520-2465. Our Anti-Discrimination and Harassment Policy can be found under "CSDA Transparency" at www.csda.net/about-csda/who-we-are.</small>			





Protected From the Unexpected

As trusted risk management advisor, SDRMA makes it easy for you to proceed with confidence. Our team is like one of your own, delivering service and expertise you won't find anywhere else. For everything from **Workers' Compensation** and **Property/Liability** coverages to **Health Benefits** options available throughout California, we are here to help. For more information, visit sdrma.org.



California Special Districts Association
1112 I Street, Suite 200
Sacramento, CA 95814

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**All New Content
Including Keynotes
& Breakout Session
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CSDA's 2024
**GENERAL
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SUMMIT**

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