

August 2022

MANAGEMENT/ADMINISTRATIVE ASSESSMENT



Rodeo-Hercules, CA Fire Protection District

DRAFT

Prepared by:



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CONSULTANT DRAFT REPORT

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Executive Summary

Fitch and Associates, LLC (FITCH) was retained by the Rodeo-Hercules Fire District (RHFD) to develop a Strategic Plan document and a management/administrative assessment. The FITCH Team came on-site in April, May and July to initiate in-person meetings and interviews with RHFD employees related to the two projects.

FITCH used a variety of techniques in completing this analysis including one-on-one, phone and virtual interviews, as well as document review, comparable agency research and financial analysis. For this portion of the project, FITCH conducted eight (8) interviews with the Board of Directors, executive staff members, labor leaders, and the Fire Chief.

At the conclusion of the analysis, FITCH made six (6) recommendations for improving efficiency and effectiveness, clarifying roles and responsibilities of elected/appointed Board members and staff, supporting current staff with manageable workloads, improving firefighter health, wellness and safety, and most importantly, reducing community risk. All recommendations were subcategorized as either a Strategic Recommendation or a Specific Recommendation.

In this report, Strategic Recommendations are considered broader in nature, with outcomes that are more difficult to quantify fully but generally considered to result in a positive impact on the organization over time. Specific Recommendations are projects or efforts with a narrow and objectively measurable outcome with usually a shorter implementation period.

Strategic Recommendations

Recommendation #1:

Decide on an option for Executive Staff and Administrative Support for the RHFD.
Implement strategies to realistically support administrative processes that are in alignment with district capacity

Option 1.1: Outsource Executive Staff and Administrative Support to another organization capable of providing the breadth and depth of services need in contemporary fire districts

Option 1.2: Keep Executive Staff and Administrative Support within RHFD. Make substantial investments to provide contemporary, regulatory and statutorily compliant services

Recommendation #2:

Decide on an option to support investments in recruitment, retention, training, professional development, succession, health and safety, and behavioral wellness of personnel

Option 2.1: Outsource to another organization capable of providing the breadth and depth of services needed in contemporary fire districts

Option 2.2: Keep services within RHFD. Make substantial investments to provide contemporary, regulatory and statutorily compliant services

Recommendation #3:

Enhance regional service delivery opportunities

Specific Recommendations

Recommendation #4:

Provide Professional Training to the Board of Directors on the Roles and Responsibilities of Board Members, staff, improving teamwork and effective governance to include:

- All current and future Board members should attend the CSDA Leadership Academy and Governance Conference for Elected and Appointed Directors
- Join the California Special Districts Association (CSDA)

Recommendation #5:

Hire a consultant that specializes in assisting elected Boards and officials develop strategies for effective governance, teamwork, professional standards and establishing roles and responsibilities of elected officials and staff.

Recommendation #6:

Provide training to the fire chief and other executive staff to increase administrative skills and abilities to include:

- Project management
- Budgeting
- Organizational appraisal, analysis and needs assessments
- Regulatory compliance and reporting
- Quality improvement/Quality Assurance program to improve system performance and outcomes

BACKGROUND

The RHFD is a full-service fire, rescue and emergency medical services department serving the unincorporated Contra Costa County area known as Rodeo and the City of Hercules. The district protects an area of 32 square miles and a combined population of 35,744 from two strategically located fire stations. The RHFD provides a full range of all-risk services including fire protection, emergency medical aid and rescue response, fire prevention and safety, training, and public education. In calendar year 2021, the RHFD responded to 2,681 calls for service.

Rodeo is an unincorporated area within Contra Costa County and is adjacent to Interstate 80 and between Hercules and Crockett. The United States Census Bureau estimated a population of 9,653 as of April 1, 2020. The City of Hercules is adjacent to Rodeo, and it has a Census-estimated population of 26,091 as of July 1, 2021. Both communities border the San Pablo Bay and extend east into the Bay Area foothills.

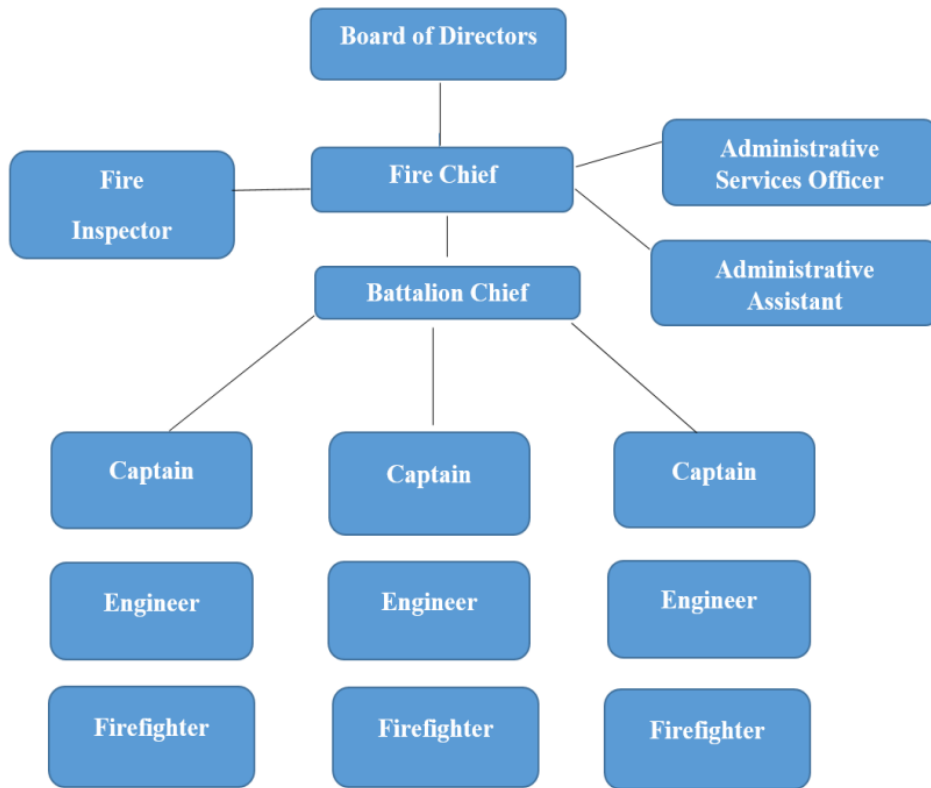
Primarily a bedroom and industrial community, the District contains a major oil refinery (Phillips 66), numerous underground fuel pipelines, two major rail lines and Interstate 80 Freeway. There are significant wildland urban interface threats within the District.

The Rodeo Fire District was formed on February 26, 1937 as an independent special district. The District was established to provide fire protection services in the unincorporated community of Rodeo. In 1978, the City of Hercules was annexed into the Fire District and subsequently the name of the District was changed from the Rodeo Fire Protection District to the Rodeo-Hercules Fire Protection District.

A five (5) member locally elected Board of Directors governs the RHFD and derives its principal funding from normal property taxes, a benefit assessment that was enacted by the Board in 1989 and Measure O, enacted by the voters of the District in 2016. The District's revenue is fixed according to the assessed valuation of the properties within the District's boundaries.

RHFD is budgeted for twenty two (22) full-time positions and one (1) part-time position. Administrative staff consists of one (1) Fire Chief, two (2) administrative services staff and one (1) part-time contract fire inspector. Operations staff consists of one (1) Battalion Chief, six (6) Captains, six (6) Engineers, and six (6) Firefighters.

Figure 1: Organizational Chart



RHFD utilizes mutual and automatic aid with surrounding fire agencies including the City of Pinole and the Contra Costa County Fire District. Besides engine, truck and specialized response, these agencies also share Battalion Chief responsibilities in Battalion 7. Pinole and Contra Costa County Fire District each provides a single Battalion Chief to ensure consistent incident command, firefighter safety, and resource management in West Contra Costa County. The Battalion serves the communities of Rodeo-Hercules, Pinole, Tara Hills, Bayview, Montalvan Manor, Montara Bay, East Richmond Heights, San Pablo, El Sobrante, unincorporated Contra Costa County, and Martinez.

Support staff, including the Fire Chief, have been particularly challenged to provide effective administrative assistance to the District and Board of Directors. In the last two decades, the administrative needs of operating small independent fire districts in California have outpaced the ability to adequately fund support staff.

Add to this the increased salary, pension and other benefit costs and prioritized budget decisions to preserve line staff and keep fire stations open. Often these decisions reduced administrative support to the detriment of the organization. Remaining staff assumed

additional tasks and support roles leading to unsustainable workloads or projects and programs that were unable to be accomplished. Key organizational programs, some of which support professional development, behavioral wellness and the health and safety of personnel were minimized as the focus was placed on keeping apparatus staffed and fire stations open.

In July 2021, the previous RHFD Fire Chief led the District in a Fire District Annexation Feasibility Study with Contra Costa County Fire District as well as the East Contra Costa County Fire Protection District. Study findings supported a greater relationship with other fire agencies. When findings and recommendations became known to the full Board and community, opposition developed around the findings, a lack of transparency and community engagement, the project process, and the rapid timetable to implement recommendation. This caused a great deal of consternation among the Board and a Rodeo-Hercules community-focused group.

From the interviews, it appears the Board is split into differing viewpoints. One perspective favors a greater relationship with other fire agencies. The relationship could be a range of annexation, consolidation or contracting for service. The other point-of-view wants to retain local control over the fire district and its daily operations.

PROJECT SCOPE

FITCH conducted a Management/Administrative Assessment of the RHFD that resulted in six (6) recommendations for improving efficiency and effectiveness, in particular the areas of administrative support and capacity. All recommendations were subcategorized as either a *Strategic Recommendation* or a *Specific Recommendation*. In this report, Strategic Recommendations are considered broader in nature, with outcomes that are more difficult to quantify fully but generally considered to result in a positive impact on the organization over time. Specific Recommendations are projects or efforts with a narrow and objectively measurable outcome and usually a shorter implementation period.

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PROJECT APPROACH

FITCH used a variety of techniques in completing this study including one-on-one interviews while onsite, virtual interviews, and document review. In total, FITCH conducted eight (8) individual interviews (both in-person and virtually) with chief officers, labor leaders and Board members.

The purpose of the interviews was to gather information on needs within the RHFD, its administration, duties, the ratio of workload within and outside of their job description, and to determine areas of responsibility where employees are not able to meet all assignments. Additional open-ended questions were used to solicit ideas for and including, but are not limited to, process efficiencies, and other opportunities and or constraints for improving the efficiency within their job assignments.

ASSUMPTIONS AND LIMITATIONS

Without conducting extensive time-motion studies for each administrative position, the assumption is made that each Board member, staff and labor leaders are making an honest and best estimate when answering interview questions regarding their workloads, job challenges, and improvement ideas. The scope of work for this project is limited to the management/administrative functions within the RHFD; however, a major component of analyzing the administrative functions required us to explore the budget (revenues and expenditures) as a whole, which has implications into other areas possibly outside the originally intended scope.

GENERAL OBSERVATIONS

The current structure of the RHFD fire administration is not typical of a California fire district. Compared to other fire districts, the administrative structure is understaffed and lean. As an independent district, RHFD does not receive administrative department-level support from within the organization. For example, cities or counties have separate human resources, administrative services and finance departments that provide a range of internal services to their fire department. RHFD does all of this with a small core of managers. The culture is family-like with everyone knowing the strengths and weaknesses of the organization as a whole. Administrative staff exhibited a “can-do” attitude even when faced with unrealistic workloads.

The RHFD administrative support structure is the Fire Chief, Battalion Chief (when available and not focused on operations), and civilian staff assigned to fire administration including and

Administrative Services Officer and Administrative Assistant. This limited organization puts the RHFD and its members in a very precarious position.

The Board also has a reasonable expectation of staff and administrative support consistent with their duties to the community as elected officials. The Board is underserved with the current structure. The lack of staff and administrative support has created occasions for the Board to work outside their established roles of strategic governance, policy-making, approving budgets and providing direction and support to the fire chief. This is detrimental to the organization and creates confusion as Board and staff roles become blurred.

The more important observation is that the current administrative workload is unsustainable without providing additional resources or outsourcing to a larger agency. A second concerning observation is the tenuous balance between key employees and the functionality of the administrative structure as the RHFD Board has increased their expectations. If the Administrative Analyst, the Fire Chief, or the one Battalion Chief were to suffer a long-term absence (illness, occupational injury, retirement) or respond to extended out-of-county deployments on wildfire incidents, the RHFD would be at risk to complete time-sensitive essential functions.

Just like a standards of cover report examines the operational resiliency and capacity to absorb additional emergency workload, also known as call volume, this analysis includes a review of the balance between efficiency and resiliency. The leaner an agency becomes, the less resilient it will be in meeting demand surges, large-scale incidents and other time sensitive or crisis events.

Fire administration must also maintain a similar balance in terms of completing critical work assignments with sufficient diligence to avoid liability yet have time to be proactive in problem-solving to mitigate issues from the start. It appears the RHFD does not have the capacity or resiliency to be proactive, and its focus is on responding to the internal or external priority issue of the moment.

Through the course of the structured interviews, a consistent message from the administrative staff was a lack of time to plan, an inability to strategic prioritize and position the RHFD for the future. Further, the administrative workload has continued to increase without analysis of new projects or programs, what it would do to the existing workload and staff capacity, and how the new assignment fits in to the overall direction and strategy of the RHFD.

Finally, the Fire Board is faced with making significant strategic decisions about the future of RHFD. As noted, there are varying viewpoints within the Board that revolve around maintaining local control over the RHFD and one advocating for a greater relationship with neighboring fire agencies.

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STRATEGIC RECOMMENDATIONS

Recommendation #1: Decide on an option for Executive Staff and Administrative Support for the RHFD. Implement strategies to realistically support administrative and human resources processes that are in alignment with district capacity

The RHFD faces a strategic decision. The choices are to make significant financial investments in its support services and administrative functions or outsource those duties to another fire agency. The list of support and administrative services at a minimum includes:

Executive-level budget creation, monitoring and reporting. Long-term budget planning	Point of contact for the Board, filling role of board clerk, and administrative support for Board	Human resources including recruitment, hiring process, background, and daily staffing
Financial and reimbursement tasks, accounts receivable and payable	IT and tech support, administrator for technology products used in the fire department	Fire Training Division support including the fire academy, certificate and training compliance administration
Executive support for the fire chief with staff reports and budget support	Community risk reduction to include fire prevention, plan review, inspection program, vegetation management, Knox Boxes, code enforcement and investigations	Professional Development, succession planning
Privacy and infection control officer supporting EMS	Facilities maintenance, planning and point of contact	Website and social media administrator
Public information officer	Scheduling for public education events	Labor agreements: negotiations, implementation and compliance
Contract administrator	Finance backup	CalJAC labor/management program support
Grants writer	Office management	Workers Compensation program administration
CalOSHA and other State and Federal mandated health and safety programs	Strategic and long-term planning	Point of contact for collaboration with county and local cities

If the RHFD decides to retain the fire chief position, support services and administrative functions, the Board should add additional full-time staffing to include:

- Fire Marshal/Battalion Chief
- One additional Administrative Assistant for a total of two

Given the workload, critical tasks and projects are not currently being completed or are being addressed in a minimal fashion. Extensive investments need to be made by the RHFD.

Additional resources would support community risk reduction, the Board's needs for community-facing projects and programs, state and federal regulatory compliance, and the health and safety of the RHFD members.

There are outsourcing options for the RHFD Board to consider. Outsourcing could include any and all positions providing management and administrative support, including the fire chief, and fire prevention. Options include:

- Consolidation with a larger fire agency capable of supporting the administrative and management needs of the RHFD
- Contract for service with neighboring fire agencies capable of supporting the administrative and management needs of the RHFD
- Consider options outlined in the July 2021 study

The contract-for-service option is widely practiced in California, in particular Los Angeles and Orange Counties. In areas where there is a large county fire agency, cities and fire protection districts have taken advantage of the cost-efficient options that a larger agency can provide due to economies of scale. Local control is minimized, but the elected board can craft contractual language that will provide input and self-control in types of decisions or services. The RHFD would not have to be dissolved, and the Board can continue to function as the voice of the electorate.

A detailed cost analysis and a transparent policy and community process should be undertaken so the costs, benefits, concerns, and limitations are openly and thoroughly vetted.

Recommendation #2: Decide on an option to support investments in recruitment, retention, training, professional development, succession, health and safety, and behavioral wellness of personnel

As noted under Recommendation #1, the RHFD faces a strategic decision. The choices are to make significant financial investments in human resources including recruitment, retention, training, professional development, succession, health and safety, and behavioral wellness of personnel. The list of training and human relations services at a minimum includes:

Human resources including recruitment, hiring process, background, and daily staffing	Fire Training Division support including the fire academy, certificate and training compliance administration	Professional development, succession planning
Professional licensure including EMT and Paramedic, and driver’s license compliance	Professional standards to include investigation and disciplinary function that comply with California Firefighters’ Procedural Bull of Rights investigations	Privacy and infection control officer supporting EMS
Labor agreements: negotiations, implementation and compliance	CalJAC labor/management program support	Workers Compensation program administration
Retirement agency and health benefits administration and support	CalOSHA and other State and Federal mandated health and safety programs	Behavioral wellness and mental health programs supporting all RHFD members
Health screening including annual physicals	COVID and other infectious disease monitoring, training and compliance	

If the RHFD decides to retain training and human resource functions in-house, the Board should add additional full-time staffing to include:

- Training and EMS Chief/Battalion Chief
- Deputy Administrative Services Officer (civilian) with a specialty in human resources (HR) management

These new positions would collaborate to support the Board’s policy goals and the members of the RHFD. Given the structure and workload, critical HR tasks and projects are not being completed or being addressed in a minimal fashion, extensive investments need to be made by the RHFD.

Additional resources would support recruitment, fire academy training, retention, professional development and succession of RHFD members. More importantly, the health and safety of the RHFD members would be prioritized. Reducing the risk and exposure of RHFD members and getting ill or injured staff back to work sooner would offset the overtime and workers compensation costs incurred by hiring additional support staff.

There are outsourcing options for the RHFD Board to consider. Outsourcing could include any and all positions providing HR, health and wellness, and program administration.

Options include:

- Consolidation with a larger fire agency capable of supporting the HR and Training needs of the RHFD
- Contract for service with neighboring fire agencies capable of supporting the HR and Training needs of the RHFD

In areas where there is a large county fire agency, cities and fire protection districts have taken advantage of the cost-efficient options that a larger agency can provide due to economies of scale. Local control is minimized, but the elected board can craft contractual language that will provide input and self-control in types of decisions or services. The RHFD would not have to be dissolved, and the Board can continue to function as the voice of the electorate. The Board's feedback would be provided to the larger fire agency's executive chiefs.

A detailed cost analysis and a transparent policy and community process should be undertaken so the costs, benefits, concerns, and limitations are openly and thoroughly vetted.

Recommendation #3: Enhance regional service delivery opportunities

The good news is that the RHFD is already participating in regional solutions. This includes a regional dispatch and communications system, emergency response with automatic and mutual aid, and shared Battalion Chief/Incident Commander position. These regional solutions provide a higher level of service at minimal cost to the communities in West Contra Costa County.

Specific regional opportunities and resource sharing exist in the areas of fire prevention, training, including entry-level fire academies, and as noted in recommendations #1 and #2, administrative and training functions. Resource sharing can exist in a variety of ways including

joint powers agreements (JPA), signed memorandum of understandings (MOU), or contracting for services.

If there is a mutual desire to increase services with little to no cost increase and provide additional depth and resiliency, then it is recommended regional opportunities be explored.

Further, if outsourcing recommendations #1 and #2 are undertaken, the RHFD should also consider outsourcing operations members. Current RHFD personnel would be transferred to the larger fire agency. RHFD would negotiate personnel, administrative and any overhead costs with the larger fire agency. Under California law, public agencies can only charge the actual cost to provide staff and services.

In contracting or consolidation options, the RHFD can maintain control of its fixed assets (fire stations) and apparatus.

SPECIFIC RECOMMENDATIONS

Recommendation #4: Provide Professional Training to the Board of Directors on the Roles and Responsibilities of Board Members, staff, improving teamwork and effective governance

The RHFD Board is faced with making significant strategic decisions about the future of RHFD. Complex and tough decisions need to be made in a transparent and time sensitive fashion, and with appropriate staff report. The core decision of becoming part of a larger fire agency is emotional and with a sense of loss.

It has not been easy to be an elected or appointed official in the last ten years due to financial strains, increased regulations and reporting, COVID, and in the case of RHFD, turnover with the Board and fire chief.

Smaller agencies, in particular fire districts, have dedicated and passionate community members who feel a strong sense of ownership and community service. Often, what these smaller special districts lack is well-trained elected and appointed officials. Specifically, training in the areas of effective governance, collaboration among board members, establishing and abiding by roles and responsibilities of board members and staff, effective communication between board members and staff that comply with the Brown Act, and effective external communication to the community and other local government agencies.

In the series of interviews, it was apparent that there is not a focus on training board members other than the State-required compliance training in ethics and harassment prevention. The RHFD Board and community would benefit from additional specialized training.

Specifically, all current and future Board members should attend the CSDA's Special District Leadership Academy (SDLA). The curriculum-based continuing education program recognizes the necessity for boards and executive staff to work together toward a common goal. The SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members. The SDLA is a two-day program and is taught twice each year, once in Southern California and once in Northern California. Details and a program flyer are included in Appendix A.

As part of this recommendation, RHFD is strongly encouraged to become a member of the CSDA. RHFD will join other California special districts and receive training, advocacy, networking, knowledge base, group insurance purchasing opportunities, consultant

connections, request for proposals (RFP) clearinghouse, and access to annual conferences. The RHFD Board members will be surrounded with other special district elected officials and executive staff who have been through similar experiences and challenges. The RHFD Board will be able to take advantage of these other special district's insight that would benefit the Rodeo-Hercules community. The link is: [Home - California Special Districts Association \(csda.net\)](http://csda.net).

Recommendation #5: Hire a consultant that specializes in assisting elected Boards and officials develop strategies for effective governance, teamwork, professional standards and establishing roles and responsibilities of elected officials and staff.

Given the challenges the RHFD Board has faced in the past, currently, and in the future, they would benefit from a professional consultant and trainer who specializes in creating effective and cohesive governing bodies.

Consultants should be selected who can provide board training and consultation in:

- Board Dynamics
- Board Planning/Facilitation
- Change Management
- Organizational Effectiveness/Establishing and observing the roles and responsibilities of the Board and Staff
- Creating Effective Interpersonal Communications
- Creating Effective Community Messaging

In addition to the RHFD Board benefiting from an effective and collaborative board, staff and the community would become the ultimate beneficiaries. It is reasonable community expectation to expect effective governance.

Recommendation #6: Provide training to the fire chief and other executive staff to increase administrative skills and abilities

As fire staff promote in their careers, often they are promoted for their operational skill. An effective incident commander does not necessarily make an effective administrator. Proficiency on the fire ground does not translate into proficiency in budgeting, strategic planning, and administration. In fire districts the fire chief is also the chief executive officer (CEO). Given that fire districts are responsible for an array of administrative, financial, human

resources responsibilities as well as supporting elected boards, the fire chief must also be a proficient administrator.

In cities and counties, other internal departments can support the fire chief. These supporting departments have directors and department heads who are equal to the fire chief. Fire districts do not have this level of support.

In the series of interviews, it was pointed out that some of the past fire chiefs were effective administrators and some struggled with the roles. For those that were challenged in their roles as fire chief, their administrative skill set had not been developed to the level needed in the CEO role in a lean organizational structure.

It is recommended that the current and future fire chief, battalion chiefs and civilian administrative staff be provided ongoing training in subject that will help them to become effective administrators. Basic competency and continuing education should be provided in:


- Project management
- Budgeting
- Organizational appraisal, analysis and needs assessments
- Regulatory compliance and reporting
- Quality improvement/Quality Assurance program to improve system performance and outcomes
- Drafting staff reports and executive-level memos

Training programs, coaches/mentors, and consultants are available to support staff in this professional development and continuing education training.


**APPENDIX A: CALIFORNIA SPECIAL DISTRICTS ASSOCIATION:
GOVERNANCE LEADERSHIP TRAINING**

GOVERNANCE LEADERSHIP TRAINING

ACHIEVING DISTRICT GOALS... TOGETHER.

 *Two Conference Location Options – First Time and Returning Attendee Tracks!*
April 3 – 6, 2022 – San Diego OR September 18 – 21, 2022 – Napa

SDLA CSDA's 2022
Special District
Leadership Academy Conference
A Comprehensive Governance Leadership Conference for Elected and Appointed Directors/Trustees



BOARD & STAFF LEARN TO WORK AS A TEAM.

Participate in the **Special District Leadership Academy Conference** and complete all four modules of the Academy during the course of two and a half days.

This conference content is based on CSDA's Special District Leadership Academy (SDLA) groundbreaking, curriculum-based continuing education program, which recognizes the necessity for the board and general manager to work closely toward a common goal. SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members.

Complete all Four Modules of the Special District Leadership Academy as Virtual Workshops



MODULE 1

Governance Foundations:
February 16 and 17, 2022
9:00 a.m. – 12:00 p.m.
each day

MODULE 2

Setting Direction / Community Outreach
March 9 and 10, 2022,
9:00 a.m. – 12:00 p.m.
each day

MODULE 3

Board's Role in Finance and Fiscal Accountability
April 18 and 19, 2022, 9:00
a.m. – 12:00 p.m. each day

MODULE 4

Board's Role in Human Resources
May 4 and 5, 2022, 9:00 a.m.
– 12:00 p.m. each day

RECOGNITION IN SPECIAL DISTRICT GOVERNANCE

BOARD MEMBERS AND TRUSTEES

SHOW YOUR COMMITMENT AND DEDICATION TO SERVING YOUR COMMUNITY.

The **Recognition in Special District Governance** was designed to acknowledge special district Board Members and Trustees who have taken extra steps to become better educated in core areas of governance.

Complete the Special District Leadership Academy + 10 additional professional development hours and receive this recognition.

1112 I Street, Suite 200, Sacramento, CA 95814 • t: 916.231.2909 • www.sdlf.org



Two Locations • Two Options

WHY ATTEND CSDA'S SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE?



Local boards are the reason why local control is local. Special district boards are the voices of the community, and they are also a large reason why special districts exist.

The truth is that every elected or appointed public official needs to worry about governance; governance is what boards do. It's what they bring to the table.

Governance is taking the wishes, needs, and desires of the community and transforming them into policies that govern the district.

Whether you're new to the board or someone who has served for many years, this conference provides essential tools and information to effectively govern your district!

Attendees will learn:

- Working as a team: The roles of the board and staff in your district.
- Attributes and characteristics of highly effective boards.
- How culture, norms, values, and operating styles influence the district.
- Specific jobs that the board must perform.
- How individual values, skills, and knowledge help to shape how effective boards operate.
- The importance of moving from "I" to "we" as the governance team.
- The board's role in setting direction for the district.
- The board's role in finance and fiscal accountability.
- And much more!



April 3 – 6, 2022
Embassy Suites San Diego Bay Downtown
601 Pacific Highway
San Diego, CA 92101

HOTEL ROOM RESERVATIONS
Room reservations are available at the CSDA rate of \$181 plus tax, single or double occupancy. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is March 3, 2022; however, space is limited and may sell out before this date.



EARLY BIRD DISCOUNT
The early bird discount for this location requires registration on or before Thursday, March 3, 2022.

Cancellations must be in writing and received by CSDA no later than March 3, 2022 at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after March 3, 2022. Substitutions are acceptable and must be done in writing no later than March 25, 2022 at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@csla.net or fax to 916-520-2465.



September 18 – 21, 2022
Embassy Suites Napa Valley
1075 California Boulevard
Napa, CA 94559

HOTEL ROOM RESERVATIONS
Room reservations are available at the rate of \$189 plus tax, single or double occupancy. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is August 29, 2022; however, space is limited and may sell out before this date.



EARLY BIRD DISCOUNT
The early bird discount for this location requires registration on or before Friday, August 19, 2022.

Cancellations must be in writing and received by CSDA no later than August 19, 2022 at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after August 19, 2022. Substitutions are acceptable and must be done in writing no later than September 9, 2022 at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@csla.net or fax to 916-520-2465.



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 Special District Leadership Academy Conference. Incentive points reduce SDRMA members' annual contribution amount.

Printed on recycled paper.



FIRST-TIME ATTENDEE - SCHEDULE OF EVENTS

SUNDAY

5:30 – 7:00 p.m.
REGISTRATION AND NETWORKING RECEPTION



Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

MONDAY

8:30 – 10:00 a.m.
BUILDING A FOUNDATION FOR GOOD GOVERNANCE

Scott Carroll, CSDM (San Diego)
Hillary Strauss, CSDM (Napa)

** This session covers Module 1 of the Special District Leadership Academy: Governance Foundations.*

In this conference session, the instructor will lay the groundwork for good governance in your district.

- Attendees will discover:
- Why good governance is so important to the overall well-being of the district.
 - The traits of effective board members.
 - What good governance means and how to effectively put it into practice.
 - How to move your board from "I" to "we," including how to become an effective team, establish team standards, and essential conditions for team building.

10:00 – 10:30 a.m.
BREAK (All Attendees)

10:30 a.m. – 12:30 p.m.
BUILDING A FOUNDATION FOR GOOD GOVERNANCE (continued)

12:30 – 1:30 p.m.
LUNCH PROVIDED (All Attendees)

1:45 – 3:00 p.m.
FULLFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE

Brent Ives, BHI Management Consulting

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership.*

This conference session will highlight the importance of setting the direction for your district. Learn the critical components of direction setting for your district along with how to avoid planning pitfalls. Attendees will walk through the steps of establishing and fulfilling your district's mission, vision, values, strategic goals, and how to communicate those objectives to your constituents.

3:00 – 3:30 p.m.
BREAK (All Attendees)

3:30 – 4:30 p.m.
FULLFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE (continued)

5:30 – 7:00 p.m.
SIP AND SAVOR EVENING RECEPTION

 SDRMA 

Sponsored by the Special District Risk Management Authority (SDRMA)

Join us for a lively evening of networking and refreshments.

TUESDAY

8:30 – 10:00 a.m.
DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS

Liebert Cassidy Whitmore

** This session covers Module 4 of the Special District Leadership Academy: Board's Role in Human Resources*

This conference session will teach participants how to determine the human resource (HR) health of their district and what areas to focus on as a board and individual governing official including:

- Identifying the board's role in human resources.
- Recognizing HR red flags and positive indicators.
- Developing and maintaining essential HR policies.
- Covering confidentiality and legal liabilities.
- Evaluating the general manager.

10:00 – 10:30 a.m.
BREAK (All Attendees)

10:30 – 12:00 p.m.
DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS (continued)

12:00 – 1:00 p.m.
LUNCH PROVIDED (All Attendees)

1:15 – 2:45 p.m.
GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH

Martin Rauch, Rauch Communication Consultants, Inc.

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership.*

This conference session looks at common communication breakdowns and potential areas for improvement in public agency communications. It will discuss proper and effective communication methods to be aware of as a governing official including:

- Identifying audiences.
- Responding to public input.
- Media relations.
- Legislative outreach and advocacy.

2:45 – 3:00 p.m.
BREAK (All Attendees)

SCHEDULE IS SUBJECT TO MINOR CHANGES BASED ON INSTRUCTOR AND LOCATION.

SDLA Graduate? Join us for our Returning Attendee Track with Two Days of Breakout Sessions with topics such as:

- HOW TO DEAL WITH DISRUPTIVE BOARD MEMBERS
- PUBLIC ENGAGEMENT
- GRAND JURIES AND LAFCO'S
- LEGAL AND LEGISLATIVE UPDATES
- FRAUD DETECTION AND PREVENTION
- CONFLICTS OF INTEREST

3:00 – 4:00 p.m.
GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH
(continued)

OPEN EVENING

WEDNESDAY

8:30 – 10:00 a.m.
SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES?
David Becker, CPA, James Marta & Company LLP, Certified Public Accountants

** This session covers Module 3 of the Special District Leadership Academy: Board's Role in Finance and Fiscal Accountability.*

This conference session will provide a review and insight of important financial concepts, reports, and policies specific to public agencies including special districts. Attendees will learn:

- How to ask the right questions.
- How to link the finance process to the district mission and goals.
- Budget process, budget assessment, and communicating budget information to the public.
- How to develop and analyze capital improvement plans and reserve guidelines.

10:00 – 10:15 a.m.
 BREAK *(All Attendees)*

10:15 a.m. – 12:00 p.m.
SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES? *(continued)*

12:00 p.m.
GRADUATION CERTIFICATE DISTRIBUTION
 First-time attendees must attend all sessions in order to receive their certificate at the conclusion of the conference.

RETURNING ATTENDEE - SCHEDULE OF EVENTS



SUNDAY

5:30 – 7:00 p.m.
REGISTRATION AND NETWORKING RECEPTION
 Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

MONDAY

8:30 a.m. – 12:30 p.m.
 BREAKOUT SESSIONS

10:00 – 10:30 a.m.
 BREAK *(All Attendees)*

12:30 – 1:30 p.m.
 LUNCH PROVIDED *(All Attendees)*

1:45 – 4:30 p.m.
 BREAKOUT SESSIONS

3:00 – 3:30 p.m.
 BREAK *(All Attendees)*

5:30 – 7:00 p.m.
SIP AND SAVOR EVENING RECEPTION
Sponsored by the Special District Risk Management Authority (SDRMA)
 Join us for an entertaining evening of networking and refreshments.

TUESDAY

8:30 a.m. – 12:00 p.m.
 BREAKOUT SESSIONS

10:00 – 10:30 a.m.
 BREAK *(All Attendees)*

12:00 – 1:00 p.m.
 LUNCH PROVIDED *(All Attendees)*

1:15 – 4:00 p.m.
 BREAKOUT SESSIONS

2:45 – 3:00 p.m.
 BREAK *(All Attendees)*

4:00 p.m.
CONFERENCE ENDS FOR RETURNING ATTENDEES



2022 Registration Form
Special District Leadership Academy Conference

(Use one form per registrant)



Three Ways to Register

- **Register online** by visiting the SDLA Conference website at sdla.csda.net.
- **Fax number:** 916-520-2465. All faxed registration forms must include credit card payment.
- **Mail:** CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. Please include registration form and payment. Checks should be made payable to: California Special Districts Association.

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 Director Cassandra Strawn at membership@csda.net or call toll-free at the number listed above.



Name/Title:		
<input type="checkbox"/> First-time Attendee <input type="checkbox"/> Returning Attendee		
District:		
Address:		
City:	State:	Zip:
Phone:		Fax:
<input type="checkbox"/> Member <input type="checkbox"/> Non-member		Email:
Emergency Contact - Name & Phone:		
WHICH CONFERENCE WILL YOU BE ATTENDING?		
<input type="checkbox"/> APRIL 3 - 6, 2022 - SAN DIEGO EARLY BIRD DISCOUNT: MARCH 3, 2022 <input type="checkbox"/> CSDA Member \$600  <input type="checkbox"/> Non-member \$900 AFTER MARCH 11 <input type="checkbox"/> CSDA Member \$675 <input type="checkbox"/> Non-member \$1,010	<input type="checkbox"/> SEPTEMBER 18-21, 2022 - NAPA EARLY BIRD DISCOUNT: AUGUST 19, 2022 <input type="checkbox"/> CSDA Member \$600  <input type="checkbox"/> Non-member \$900 AFTER AUGUST 27 <input type="checkbox"/> CSDA Member \$675 <input type="checkbox"/> Non-member \$1,010	
SEND MORE - SAVE MORE! -- SPECIAL DISCOUNTED PRICING!		
ADDITIONAL ATTENDEE FROM THE SAME DISTRICT BEFORE EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$400 <input type="checkbox"/> Non-member \$600	ADDITIONAL ATTENDEE FROM THE SAME DISTRICT AFTER EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$475 <input type="checkbox"/> Non-member \$715	
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:	Authorized Signature:
Special needs		
<input type="checkbox"/> Vegetarian <input type="checkbox"/> Other:		

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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.



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.



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