

# CSAC BOARD OF DIRECTORS

## BRIEFING MATERIALS

Thursday, March 7 2024

9:00am - 1:30pm



*Tsakopoulos Library Galleria | 828 I Street, Sacramento*

**Zoom: <https://us02web.zoom.us/j/88039921908?pwd=V3hwM0I4UEY4dJB0dS9jcU5tU3YzQT09>**

**Conference Line: (669) 900-6833 | Meeting ID: 880 3992 1908 | Password: 547323**

California State  
Association of Counties



CALIFORNIA STATE ASSOCIATION OF COUNTIES  
BOARD OF DIRECTORS

Thursday, March 7, 2024 | 9:00 am – 1:30 pm

Tsakopoulos Library Galleria | 828 I Street, Sacramento, CA 95814

Zoom: <https://us02web.zoom.us/j/88039921908?pwd=V3hwM0l4UEY4djB0dS9jcU5tU3YzQT09>

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AGENDA

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Presiding: Bruce Gibson, President

**THURSDAY, MARCH 7**

9:00 AM **BOARD OF DIRECTORS ORIENTATION**

- *Graham Knaus | Chief Executive Officer*
- *Jacqueline Wong-Hernandez | Chief Policy Officer*
- *Chastity Benson | Chief Operating Officer*

10:00 AM **PROCEDURAL ITEMS**

1. Pledge of Allegiance

*Page 1*

2. Roll Call

*Page 2-3*

**SPECIAL PRESENTATIONS**

3. CEO's Report

*Page 4*

- *Graham Knaus | Chief Executive Officer*

**ACTION ITEMS**

4. Approval of Minutes from November 16, 2023

*Page 5-7*

5. Approval of 2027 Annual Meeting Site Selection

- *Farrah McDaid Ting | Director of Member Engagement*

*Page 8-10*

**SPECIAL PRESENTATIONS**

6. Legislative & Elections Update

*Page 11-15*

- *Jacqueline Wong-Hernandez | Chief Policy Officer*

7. National Association of Counties (NACo) Update

- *Jacqueline Wong-Hernandez | Chief Policy Officer*
- *Justin Garrett | Senior Legislative Advocate & Federal Affairs Manager*

8. Litigation Coordination Program Update

- *Jennifer Henning | Litigation Counsel & Executive Director of the County Counsels' Association*

**CSAC REPORTS**

9. CSAC Finance Corporation Report

*Page 16-28*

- *Supervisor Oscar Villegas | Yolo County, President, CSAC FC*
- *Alan Fernandes | Chief Executive Officer, CSAC FC*
- *Rick Brush | Chief Member Services Officer, PRISM*

**CSAC REPORTS CONTINUED**

10. Operations & Member Services Report *Page 29-30*  
➤ *Chastity Benson | Chief Operating Officer*

11. California Counties Foundation Report *Page 31-36*  
➤ *Paul Danczyk | Chief Operating Officer, California Counties Foundation*

12:00 PM **LUNCH**

12:45 PM **INFORMATION & DISCUSSION ITEMS**

12. Minute Mics: Board of Directors Roundtable  
• What's going on in your county (in one minute)

**INFORMATION ITEMS WITHOUT PRESENTATION**

- CSAC Litigation Coordination Program Report *Page 37-53*
- CSAC Institute Course Guide *Page 54-70*
- Institute for Local Government (ILG) Reports *Page 71-74*
- 2024 Calendar of Events *Page 75*

1:30 PM **ADJOURN**



*United States of America*  
Pledge of Allegiance



California State Association of Counties®

**CALIFORNIA STATE ASSOCIATION OF COUNTIES**  
 Board of Directors  
 2023-2024

<b>SECTION</b>	<b>President:</b>	Bruce Gibson, San Luis Obispo
U=Urban	<b>First Vice President:</b>	Jeff Griffiths, Inyo
S=Suburban	<b>Second Vice President:</b>	Susan Ellenberg, Santa Clara
R=Rural	<b>Immediate Past President:</b>	Chuck Washington, Riverside

*Members of the CSAC Executive Committee are highlighted for your reference*

SECTION	COUNTY	DIRECTOR
U	Alameda County	Keith Carson
R	Alpine County	Terry Woodrow
R	Amador County	Richard Forster
S	Butte County	Tod Kimmelshue
R	Calaveras County	Benjamin Stopper
R	Colusa County	Kent Boes
U	Contra Costa County	John Gioia
R	Del Norte County	Chris Howard
R	El Dorado County	John Hidahl
U	Fresno County	Buddy Mendes
R	Glenn County	Grant Carmon
R	Humboldt County	Michelle Bushnell
S	Imperial County	Jesus Eduardo Escobar
R	Inyo County	Trina Orrill
S	Kern County	Leticia Perez
R	Kings County	Rusty Robinson
R	Lake County	Bruno Sabatier
R	Lassen County	Gary Bridges
U	Los Angeles County	Kathryn Barger
R	Madera County	Leticia Gonzalez
S	Marin County	Mary Sackett
R	Mariposa County	Rosemarie Smallcombe
R	Mendocino County	John Haschak
S	Merced County	Scott Silveira
R	Modoc County	Ned Coe
R	Mono County	John Peters
S	Monterey County	Luis Alejo
S	Napa County	Ryan Gregory
R	Nevada County	Heidi Hall

U	Orange County	Doug Chaffee
S	Placer County	Bonnie Gore
R	Plumas County	Tom McGowan
U	Riverside County	V. Manuel Perez
U	Sacramento County	Rich Desmond
R	San Benito County	Bea Gonzales
U	San Bernardino County	Jesse Armendarez
U	San Diego County	Nora Vargas
U	San Francisco City & County	Rafael Mandelman
U	San Joaquin County	Robert Rickman
S	San Luis Obispo County	Bruce Gibson
U	San Mateo County	David Canepa
S	Santa Barbara County	Das Williams
U	Santa Clara County	Susan Ellenberg
S	Santa Cruz County	Bruce McPherson
R	Shasta County	Kevin Crye
R	Sierra County	Lee Adams
R	Siskiyou County	Ed Valenzuela
S	Solano County	Erin Hannigan
S	Sonoma County	James Gore
S	Stanislaus County	Vito Chiesa
R	Sutter County	Dan Flores
R	Tehama County	Candy Carlson
R	Trinity County	Ric Leutwyler
S	Tulare County	Amy Shuklian
R	Tuolumne County	Ryan Campbell
U	Ventura County	Kelly Long
S	Yolo County	Lucas Frerichs
R	Yuba County	Don Blaser

**TREASURER**

Belia Ramos, Napa County

**ADVISORS**

Sarah Carrillo, County Counsel, Tuolumne County

Jeff Van Wagenen, Riverside County CAO, California Association of County Executives, President



**OFFICERS**

**President**

Bruce Gibson  
San Luis Obispo County

**1st Vice President**

Jeff Griffiths  
Inyo County

**2nd Vice President**

Susan Ellenberg  
Santa Clara County

**Past President**

Chuck Washington  
Riverside County



**CEO**

Graham Knaus

March 7, 2024

**TO:** CSAC Board of Directors

**FROM:** Graham Knaus | Chief Executive Officer

**SUBJECT:** **CEO's Report**

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This item provides an opportunity to discuss the state of the Association and core priorities as well as refine the strategic approach to advocacy and communications through Board of Directors input.

CALIFORNIA STATE ASSOCIATION OF COUNTIES  
BOARD OF DIRECTORS  
November 16, 2023

Oakland Convention Center | East 2

Zoom: <https://us02web.zoom.us/j/87486789058?pwd=QlVKOEdrSCtmZjU2ajd5d2ZKSC9Ydz09>

Conference Line: (669) 900-6833 | Meeting ID: 874 8678 9058 | Password: 686286

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MINUTES

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**1. Roll Call**

OFFICERS

Chuck Washington | President  
Bruce Gibson | 1<sup>st</sup> Vice President  
Jeff Griffiths | 2<sup>nd</sup> Vice President  
Ed Valenzuela | Immediate Past President

ADVISORS

Sarah Carillo | County Counsel  
San Luis Obispo County  
Wendy Tyler | California Association of County  
Executives President (*absent*)

CSAC STAFF

Graham Knaus | Chief Executive Officer  
Jacqueline Wong-Hernandez | Chief Policy Officer  
Chastity Benson | Chief Operating Officer

EX OFFICIO MEMBER

Vito Chiesa | Treasurer, Stanislaus County

Alameda	–	Keith Carson	Orange	–	Doug Chaffee
Alpine	–	Terry Woodrow	Placer	–	Bonnie Gore
Amador	–	Richard Forster	Plumas	–	<i>Absent</i>
Butte	–	Tom Kimmelshue	Riverside	–	V. Manuel Perez
Calaveras	–	<i>Absent</i>	Sacramento	–	Rich Desmond
Colusa	–	Kent Boes	San Benito	–	Bea Gonzales
Contra Costa	–	<i>Absent</i>	San Bernardino	–	Jesse Armendarez
Del Norte	–	Chris Howard	San Diego	–	<i>Absent</i>
El Dorado	–	John Hidahl	San Francisco	–	Rafael Mandelman
Fresno	–	<i>Absent</i>	San Joaquin	–	Robert Rickman
Glenn	–	Grant Carmon	San Luis Obispo	–	Bruce Gibson
Humboldt	–	Michelle Bushnell	San Mateo	–	Noelia Corzo
Imperial	–	<i>Absent</i>	Santa Barbara	–	Das Williams
Inyo	–	Trina Orrill	Santa Clara	–	Susan Ellenberg
Kern	–	<i>Absent</i>	Santa Cruz	–	Bruce McPherson
Kings	–	Doug Verboon	Shasta	–	Tim Garman
Lake	–	Bruno Sabatier	Sierra	–	Lee Adams
Lassen	–	Gary Bridges	Siskiyou	–	Ed Valenzuela
Los Angeles	–	<i>Absent</i>	Solano	–	Erin Hannigan
Madera	–	Leticia Gonzalez	Sonoma	–	James Gore
Marin	–	Mary Sackett	Stanislaus	–	Vito Chiesa
Mariposa	–	Rosemarie Smallcombe	Sutter	–	Dan Flores
Mendocino	–	John Haschak	Tehama	–	Candy Carlson
Merced	–	Scott Silveira	Trinity	–	Ric Leutwyler
Modoc	–	Ned Coe	Tulare	–	Amy Shuklian
Mono	–	John Peters	Tuolumne	–	Ryan Campbell
Monterey	–	Luis Alejo	Ventura	–	<i>Absent</i>
Napa	–	Ryan Gregory	Yolo	–	Lucas Frerichs
Nevada	–	Heidi Hall	Yuba	–	Don Blaser



**2. CEO's Report**

Graham Knaus, CEO, provided an update on the Association.

**3. Special Presentation from California State Treasurer Fiona Ma**

California State Treasurer, Fiona Ma, presented to the Board.

**4. Approval of Minutes from August 31, 2023**

A motion to approve the Meeting Minutes from August 31, 2023, was made by Supervisor Forster and was seconded by Supervisor Hannigan. The motion passed unanimously.

**5. Election of 2024 Executive Committee**

A motion to approve the 2023-2024 Executive Committee was made by Supervisor Alejo and was seconded by Supervisor Forster. The motion passed unanimously

**6. Resolution Authorizing Conduct of CSAC Business**

A motion to approve the Resolution Authorizing Conduct of CSAC Business was made by Supervisor Ellenberg and was seconded by Supervisor Smallcombe. The motion passed unanimously

**7. Adoption of 2024 CSAC Policy Priorities**

Each of CSAC's 5 Policy Committees convened as part of CSAC's 129<sup>th</sup> Annual Meeting. The following chairs/vice-chairs provided a report to the board, which included each committee's 2024 adopted priorities:

- Administration of Justice: Vice-Chair Rich Desmond, Sacramento County
- Agriculture, Environment, & Natural Resources: Chair Chris Howard, Del Norte County
- Government Finance & Administration: Chair Amy Shuklian, Tulare County
- Health & Human Services: Vice-Chair Doug Chaffee, Orange County
- Housing, Land Use, & Transportation: Chair Jennifer Kreitz, Mono County

A motion to approve the 2024 CSAC Policy Priorities was made by Supervisor Sabatier and was seconded by Supervisor Smallcombe. The motion passed unanimously.

**8. Proposition 1 MHSA**

In October, CSAC's Health & Human Services Policy Committee unanimously voted to take "no position" on Proposition 1. This recommendation was forwarded to the Executive Committee and Board of Directors as an informational item. Jacqueline Wong-Hernandez, CPO, and Jolie Onodera, Senior Legislative Advocate, provided an update on this ballot measure.

**9. Federal Priorities Issues Update**

Joe Krahn, Tom Joseph, and Hasan Sarsour of Paragon Government Relations provided a Federal Priorities and Issues update to the Board.

## **10. Caucus Reports**

### **Suburban**

Supervisor Bruce Gibson, Suburban Caucus Chair, provided an update on the Suburban Caucus Meeting.

### **Urban**

Supervisor Chuck Washington, Urban Caucus Chair, provided an update on the Urban Caucus Meeting, which included the election of Supervisor Susan Ellenberg (Santa Clara County) as CSAC's new 2<sup>nd</sup> Vice President and Supervisor Rich Desmond (Sacramento County) to the Executive Committee.

### **Rural**

Supervisor Jeff Griffiths, Rural Caucus Chair, provided an update on the Rural Caucus Meeting, which included the election of Supervisor Ryan Campbell (Tuolumne County) as the alternate rural member to the Executive Committee.

## **11. Conflict of Interest Policy Form**

CSAC Litigation Counsel Jennifer Henning provided a brief overview of the CSAC Conflict of Interest Policy and asked each Board Member to sign and return a Conflict of Interest form.

## **12. CSAC Finance Corporation Report**

Supervisor Oscar Villegas, Finance Corp. President, and Alan Fernandes Finance Corp. CEO, provided an update to the Board, highlighting their Corporate Associates Program and Easy Smart Pay.

Jim Manker, Director of Business Development, introduced Corporate Partner Dan Neville, Executive Director of NextEra Resources. Mr. Neville presented on the work of NextEra.

## **13. California Counties Foundation Report**

Paul Danczyk, Chief Operating Officer of the California Counties Foundation, provided an update on the work of the Foundation and Institute.

## **14. Institute for Local Government (ILG)**

Erica Manuel, Executive Director of the Institute for Local Government (ILG), presented to the Board.

**The next Board of Directors Meeting will be held on March 7, 2024, in Sacramento, California**



**OFFICERS**

**President**

Bruce Gibson  
San Luis Obispo County

**1st Vice President**

Jeff Griffiths  
Inyo County

**2nd Vice President**

Susan Ellenberg  
Santa Clara County

**Past President**

Chuck Washington  
Riverside County



**CEO**

Graham Knaus

March 7, 2024

TO: CSAC Board of Directors

FROM: Graham Knaus | Chief Executive Officer  
Chastity Benson | Chief Operating Officer

**SUBJECT: Site Selection for 2027 CSAC Annual Meeting – ACTION ITEM**

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**ACTION REQUESTED: Approve Executive Committee recommendation to hold the 2027 CSAC Annual Meeting in San Francisco City and County November 28, 2027 – December 3, 2027.**

According to CSAC’s bylaws, Association staff must present potential Annual Meeting sites for approval by the Executive Committee and Board of Directors up to four years in advance. This policy is designed to increase efficiency, garner beneficial room rates, lower overall costs for advance booking, and expedite planning for county supervisors, staff, and partners who wish to attend.

Additionally, the 2027 CSAC Annual Meeting is slated to take place in a northern California county, as has been common practice in the Association since before 1995. Please refer to the “CSAC Annual Meeting Site History Since 1995” attachment for more background on the practice of alternating meeting sites between northern and southern counties.

**Site Selection Process**

The site selection process for the 2027 Annual Meeting began with a Request for Proposals (RFPs) from various venues in northern California counties. The CSAC Annual Meeting gathers nearly 700 participants who participate in more than 75 separate meetings and events over the course of four or five weekdays.

The CSAC 2027 Annual Meeting RFP specified the need for a venue or venues that can host a meeting of 500 to 700 participants, has at least 1500 hotel room nights available, and space for a 65-plus booth exhibit hall.

CSAC solicited full RFPs from sites in Monterey County, Sacramento County, San Francisco City and County, and San Mateo County. Additionally, CSAC engaged with sites located in El Dorado, Fresno, Merced, Napa, San Joaquin, Santa Barbara, Shasta, and Stanislaus Counties, but could not locate venues suitable for the Association’s size and specifications.

After carefully reviewing the proposals and engaging in some initial upfront negotiation, staff has determined that three sites (Monterey County, San Francisco City and County, and San Mateo County) met the Association’s criteria, timing, and objectives for the 2027 event. Despite significant negotiation, the Sacramento SAFE Credit Union Convention Center ultimately could not accommodate a reasonable date range in November or December of 2027.

### 2027 Annual Meeting Site Information

The CSAC Executive Committee considered the following qualifying sites for the 2027 Annual Meeting:

LOCATION	CITY	AVAILABLE DATES	ROOM RATE	PARKING	RECOMMEND?
<b>San Francisco City and County</b>	San Francisco	November 28, 2027- December 3, 2027	\$235.00	Self-parking – \$65.00 Plus Tax	<b>YES</b>
<b>Monterey County</b>	Monterey	December 5-10, 2027	\$204 - \$289	Self-parking \$20.00	<b>NO – available date is very late</b>
<b>San Mateo County</b>	Burlingame	Nov 28, 2027 to Dec 3, 2027 -	\$199	Parking & Airport Shuttles Available	<b>MAYBE</b>

### Next Steps

**The CSAC Executive Committee voted to forward a recommendation to hold the 2027 CSAC Annual Meeting in San Francisco City and County November 28, 2027-December 3, 2027.**

The Executive Committee was also briefed on the rising costs for hospitality services and the extremely competitive market for conference sites and directed staff to undertake early site reviews for 2028 and 2029. Staff are working to bring site information to the Executive Committee for review on August 8, 2024.

If the Executive Committee’s recommendation to hold the 2027 CSAC Annual Meeting in San Francisco City and County November 28-December 3, 2027, is approved by this Board today, CSAC will move to immediately lock in the proposed RFP rates and details.

Attachments: CSAC Annual Meeting Site History Since 1995

## CSAC Annual Meeting History

Updated August 2023

Year	Region	County	City	Venue
2026	South	San Diego	Chula Vista	Gaylord Chula Vista
2025	North	Santa Clara	San Jose	Marriott & Hilton
2024	South	Los Angeles	Pasadena	Pasadena Convention Center
2023	North	Alameda	Oakland	Marriott Oakland City Center & Convention Center
2022	South	Orange	Anaheim	Disneyland Hotel
2021	North	Monterey	Monterey	Convention Center, Portola & Marriott
2020	South	Los Angeles	Los Angeles	The Westin Bonaventure Hotel (Cxl; moved online)
2019	North	San Francisco	San Francisco	Hilton San Francisco Union Square
2018	South	San Diego	San Diego	Marriott Marquis San Diego
2017	North	Sacramento	Sacramento	Convention Center & Hyatt Regency
2016	South	Riverside	Palm Springs	Convention Center & Renaissance
2015	North	Monterey	Monterey	Marriott and Portola
2014	South	Orange County	Anaheim	Disneyland Hotel
2013	North	Santa Clara	San Jose	Convention Center & Marriott
2012	South	Los Angeles	Long Beach	Convention Center & Hyatt Regency
2011	North	San Francisco	San Francisco	Hilton San Francisco Union Square
2010	South	Riverside	Riverside	Convention Center & Marriott
2009	North	Monterey	Monterey	Convention Center & Marriott
2008	South	San Diego	San Diego	Grand Hyatt
2007	North	Alameda	Oakland	Marriott Oakland City Center
2006	South	Orange County	Anaheim	Disneyland Hotel
2005	North	Santa Clara	San Jose	Convention Center & Marriott
2004	South	San Diego	San Diego	San Diego Concourse, Westin & US Grant
2003	North	Monterey	Monterey	Convention Center, Doubletree & Marriott
2002	South	Los Angeles	Pasadena	Pasadena Center & Hilton
2001	North	Sacramento	Sacramento	Convention Center, Sheraton & Hyatt Regency
2000	South	San Bernardino	Ontario	Convention Center, Marriott & Doubletree
1999	North	Monterey	Monterey	Marriott
1998	South	Orange County	Anaheim	Disneyland Hotel
1997	North	San Mateo	Burlingame	Hyatt Regency
1996	South	San Diego	San Diego	Doubletree
1995	North	Santa Clara	San Jose	Fairmont



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Riverside County



**CEO**

Graham Knaus

March 7, 2024

**TO:** CSAC Board of Directors  
**FROM:** Jacqueline Wong-Hernandez | Chief Policy Officer  
**SUBJECT:** **Legislative & Elections Update**

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CSAC Advocacy staff will provide a verbal update on AT HOME efforts, key legislation and initiatives, and the March 5 primary election.

The second year of a two-year legislative session began on January 3, 2024. January and February included a flurry of legislative deadlines in quick succession. Ultimately, Wednesday January 31 was the last day for each house to pass bills that were introduced in that house in 2023 (i.e. the house of origin deadline). There was little time to mourn the bills that did not pass the house of origin deadline, as hundreds of new bills were introduced daily ahead of the bill introduction deadline on Friday, February 16. At this time, there are 2,127 bills pending in the Legislature. Of these bills, the CSAC legislative advocacy team has identified more than 1,500 bills so far to monitor that may have an impact on county government. Comparatively, in 2023 legislators introduced 2,662 bills in total.

On February 5, Senator Mike McGuire was sworn-in as the new Senate President pro Tempore. Senator Toni Atkins, the former Senate President pro Tempore, announced last year that Senator Mike McGuire had been selected by the Senate Democratic Caucus as the next pro Tempore. For the Assembly, since Assembly Member Robert Rivas became the new Speaker this past July, Speaker Rivas has made several changes to committee appointments and continues to define his new role and leadership style.

**Legislative Advocacy Staff Update**

In February 2024, several exciting changes occurred within the legislative advocacy team, as follows:

- **Stancia Boatner** has shifted portfolios from Administration of Justice to serve as the Legislative Analyst for Government Finance and Administration, supporting Kalyn Dean and Eric Lawyer.
- **Michaela Schunk** was promoted from Legislative Coordinator to Legislative Analyst for Administration of Justice, supporting Ryan Morimune.
- **Paul Shafer** joined the CSAC legislative advocacy team in February as the new Legislative Coordinator.
- **Jessica Sankus** was promoted from Legislative Analyst of Government Finance and Administration to Principal Fiscal and Policy Analyst – the utility player position on the advocacy team that works across all the policy units.

The complete roster and contact information for the CSAC legislative advocacy team is available on the [CSAC website](#).



# 2024 Policy Committee Priorities

*As Adopted by the CSAC Board of Directors on November 16, 2023*

## **Administration of Justice (AOJ)**

### ➤ **Felony Incompetent to Stand Trial (IST) Growth Cap and Penalty Program**

For over the last decade, the statewide felony incompetent to stand trial (IST) population has grown considerably. Individuals who are facing felony charges and deemed IST are referred to the Department of State Hospitals (DSH) to receive restoration services. However, given that the increase of those determined to be IST has outpaced the capacity at DSH, the Administration has invested in local efforts and relied heavily on counties to reduce the state's waitlist, meet due process rights, and provide timely substantive treatment. Despite significant local investments by the Administration, counties must now also adhere to an IST growth cap and penalty process, which establishes a cap on the number of IST commitments from each county. CSAC will continue to support local planning efforts for counties facing a penalty, as well as advocate for additional changes to DSH's growth cap and penalty program that better reflect the shared goal of reducing the number of individuals who are deemed IST, prior to being referred to the state by the courts.

### ➤ **Division of Juvenile Justice (DJJ) Realignment Implementation**

As the Legislature and advocates prioritize local accountability, transparency, and community-based and justice-involved inclusion within the juvenile justice continuum, we will continue to see legislation that imposes additional requirements and restrictions, increasing litigation risks during a time when counties are experiencing extreme workforce challenges. In response, CSAC will continue to focus on funding to protect county interests consistent with the Administration of Justice Policy Platform and advocate for legislation that prevents additional barriers to successful DJJ implementation. More specifically, our focus will be policies and budget investments that help ensure the delivery of individualized services and specialized treatment necessary for rehabilitation, reentry, and positive youth outcomes.

## **Agriculture, Environment and Natural Resources (AENR)**

### ➤ **Emergency Preparedness**

2023 brought unprecedented disasters and emergencies to every corner of the state—from expansive rain, flood and snow events to a first-in-decades hurricane, wildfires and earthquakes. CSAC staff will advocate for appropriate state, federal and local emergency support and planning, funding for emergency management planning, and aid for all community residents affected by disasters. Counties need investment from state and federal partners, including in areas where they are the majority landowner, to reduce the risk from catastrophic future disasters—whether from wildfire, flood or other extreme weather events.

➤ **Organic Waste**

The world of organic waste collection is rapidly changing as local governments race to keep up with the regulation's ambitious timelines. CSAC has been advocating on this issue since SB 1383 was passed in 2016, and throughout Department of Resources Recycling and Recovery (CalRecycle) formal and informal rulemaking process. However, counties are struggling to come into compliance with CalRecycle regulations after they became enforceable in January 2022. CSAC plans to make SB 1383 cleanup, reform, and funding a legislative priority in 2024. To ensure maximum success we will partner with other stakeholders including other local government organizations as well as environmental and industry advocates.

➤ **Permit Streamlining**

Throughout 2023 CSAC staff worked with partners to identify and support permit streamlining for water and flood projects. CSAC also collaborated with local county-affiliated organizations to educate counties and project proponents on types of permits streamlining available to our teams. Moving into 2024, CSAC will continue to build upon these permits streamlining successes to develop permanent actions that improve county water, flood and environmental restoration projects while reducing the amount of time it takes to obtain state permits.

## **Government Finance and Administration (GFA)**

➤ **Protecting Local Revenues and Fiscal Sustainability**

CSAC will continue to advocate against exclusions to property or sales and use taxes that reduce vital county revenue and fight to ensure the will of the voters is protected so communities can decide their own futures. CSAC will resist any action by the state to further divert local revenue streams to bridge the state's budget deficits.

➤ **State-Imposed Mandate Reimbursement Reform and Debt Repayment**

CSAC will renew efforts to secure repayment of the remaining debt owed to counties for services already rendered due to new or expanded program or service mandates and will actively work with the Governor's administration and local government stakeholders to review the current mandate reimbursement system, identify potential alternatives to establish greater payment security, and reduce the potential for payment backlogs on services already rendered. To this end, CSAC will lead discussions and advocate for alternatives to the process for mandate determination, methodologies, and processes for mandate cost estimates, among other solutions.



➤ ***Resist Further Expansion of Workers' Compensation Presumptions and Changes to Individual Elements of the Overall System***

To protect county employers, CSAC will oppose efforts to create new presumptions and to expand existing presumptions without data-driven evidence that the current system is unjust; and educate policymakers about how the workers' compensation system operates, and that the system currently covers employee injuries and conditions that are job-related.

## **Health and Human Services (HHS)**

- Continued advocacy to address the state's homelessness crisis, grounded in the AT HOME plan.
- Continued funding and technical assistance for implementation of the CARE Act.
- Active participation in the stakeholder process with CDSS as they analyze the costs and benefits of shifting IHSS collective bargaining to the state.
- Enhancing advocacy around early childhood and childcare.
- Ensuring counties receive adequate funding and technical assistance through the continued CalAIM initiative.
- Supporting ongoing advocacy to ensure counties receive sustained funding and resources as the numerous new behavioral health related initiatives go live.

## **Housing, Land Use and Transportation (HLT)**

- Support efforts to sustainably expand the responsible construction and preservation of housing that is affordable to our community members.
- Promote the role of counties in effective land use decisions that recognize local realities, infrastructure needs and available resources.
- Engage in efforts that lead to reasonable solutions which appropriately balance addressing the climate impact of county transportation and vehicle fleets within available resources.



# 2024 Legislative Priorities

As approved by the CSAC Board of Directors on November 16, 2023.

Californians look to counties for the protection of public health and safety, economic security, and the provision of critical services in transportation, business regulation, planning, agriculture, libraries, and protection and improvement of the environment. As the closest level of government to the people, every person in California lives in a county. The following are the primary advocacy priorities on CSAC's docket for the 2024 legislative session.



## Homelessness

Advocate for sustainable funding and policies that address the causes of homelessness



## CalAIM Implementation

Advocate for prioritization and funding of counties to provide services



## Housing

Advocate for the expansion of responsible construction and preservation of affordable housing



## Protecting Local Revenue

Advocate for decisions about local revenues to be made by local agencies, not the state



## Behavioral Health

Advocate for adequate, sustained funding to match new services and administration expectations



## Workforce Challenges

Advocate for policies that can help counties more effectively recruit, hire, and retain qualified workers



## CARE Court Funding

Advocate to secure adequate, flexible, and sustained funding to support counties' efforts in this new statewide initiative



## Permit Streamlining

Advocate for permanent actions to improve county water, flood and environmental restoration projects



## Emergency Preparedness

Advocate for emergency support, funding for emergency management planning, and aid for all community residents affected by disasters



## Felony IST

Advocate for changes to the growth cap and penalty program to reflect the shared goal of reducing the number of individuals who are deemed IST



## Reimbursement Reform

Advocate for alternatives to establish greater payment security, and reduce the potential for payment backlogs on services already rendered



## Juvenile Justice Reform

Advocate for funding to implement infrastructure plans that meet the short-term and long-term, individualized needs of youth



## Organic Waste

Advocate for adequate reform and funding for Senate Bill 1383



## Public Records Act

Advocate to reduce vexatious litigants using the PRA to grind government work to a halt



## Climate Change

Advocate for sustainable and adaptable climate change legislation

For more information on CSAC's legislative priorities, please visit [www.counties.org](http://www.counties.org)



March 7, 2024

**To:** CSAC Board of Directors

**From:** Oscar Villegas, President  
Alan Fernandes, Chief Executive Officer

**RE:** **CSAC Finance Corporation Report**

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**CSAC Finance Corporation Board of Directors**

The CSAC Finance Corporation (CSAC FC) Board of Directors is preparing for its Annual Spring Meeting scheduled for May 1, 2024, through May 3, 2024. The CSAC FC Board is appreciative for the CSAC Executive Committee's reappointment of the following CSAC FC Board members:

- ***Oscar Villegas, Suburban Supervisor, Yolo County and current CSAC FC Board President***
- ***Susan Muranishi, County Administrative Officer, Alameda County***
- ***Leonard Moty, Retired Shasta County Supervisor and service to multiple public Boards and Councils***
- ***Matthew Jennings, Treasurer/Tax-Collector, Riverside County***

Finally, the second county agency or department head designated seat of the CSAC FC Board was vacated, not due to a term expiration but due to the resignation of Mary Zeeb, Treasurer/Tax-Collector Monterey County, who accepted an appointment to the CalTRUST Board of Trustees. This recent appointment to the CalTRUST Board of Trustees necessitated the resignation from the CSAC FC Board. As such the CSAC Executive Committee also took action to appoint ***Jack Pellegrino, NIGP-CPP, CPPO, CPCM, Director - Department of Purchasing & Contracting, County of San Diego.***

**Corporate Associates Program**

The Corporate Associates Program has continued to be robust during the 2023-2024 Fiscal Year, with 74 partners across the three levels. Staff is excited to announce the following new partners: at the **Platinum Level** - Deloitte & Touche LLP (Vanessa Vacca and Kevin Wijayawickrama), Haggerty Consulting (Jessi Widhalm and Ashley Dalton), Mosaic Solutions and Advocacy (Matt Cate and Darby Kernan), and Municipal Finance & Services Corporation (Scott Chilson) and at the **Gold Level** - EY (Jeff Reynolds) has also joined. Staff is in ongoing conversations with many other potential partners and have plans to bring them into the program in the upcoming weeks and months.

The most updated partner roster is attached as is the updated Program Description for information regarding each of our Business Partners and the services they provide to counties and other local agencies.

For more information regarding the CSAC FC Corporate Associates Program please visit our website at: ([www.csacfc.org](http://www.csacfc.org)), call (916-548-3280) or email Jim Manker ([jim@csacfc.org](mailto:jim@csacfc.org)). The current partner list is attached for your reference.



Alan Fernandes  
Chief Executive Officer  
Alan@csacfc.org  
(916)650-8175

Rob Pierce  
Chief Operating Officer  
Rob@csacfc.org  
(916) 650-8111

The CSAC Finance Corporation offers value-added products and services to California's counties, their employees and residents as well as to other forms of local government. Our programs are designed to assist county governments in reducing costs, improving services, and increasing efficiency. Our offerings provide the best overall local government value and the revenue generated by the CSAC Finance Corporation supports CSAC's advocacy efforts on behalf of California's counties.

## Business Program Summary

**CSCDA**  
Financing  
www.cscda.org



**Cathy Barna**  
cbarna@cscda.org  
(800) 531-7476

The California Statewide Communities Development Authority (CSCDA) was created in 1988, under California's Joint Exercise of Powers Act, to provide California's local governments with an effective tool for the timely financing of community-based public benefit projects. Currently, more than 530 cities, counties and special districts have become Program Participants to CSCDA - which serves as their conduit issuer and provides access to an efficient mechanism to finance locally-approved projects. To date, CSCDA has issued more than \$70 billion in tax exempt bonds helping local governments build community infrastructure, provide affordable housing, create jobs, make access available to quality healthcare and education, and more.

**Nationwide**  
Deferred Compensation  
www.nrsforu.com



**Rob Bilo**  
Bilor@nationwide.com  
(877) 677-3678

The Nationwide Retirement Solutions program is the largest deferred compensation program in the country for county employees. In California, over 65,000 county employees save for their retirement using this flexible, cost-effective employee benefit program. This program is the only one with a national oversight committee consisting of elected and appointed county officials who are plan participants. Additionally, an advisory committee comprised of California county officials provides additional feedback and oversight for this supplemental retirement program. Currently 34 counties in California have chosen Nationwide to help their employees save for retirement.

**CalTRUST**  
Investing  
www.caltrust.org



**Laura Labanieh**  
Laura@caltrust.org  
(833) CALTRUST

The Investment Trust of California (CalTRUST) is a JPA established by public agencies in California for the purpose of pooling and investing local agency funds - operating reserves as well as bond proceeds. CalTRUST offers the option of five accounts to provide participating agencies with a convenient method of pooling funds - a liquidity fund, a government fund, a short-term, and a medium-term, and a new ESG compliant money market fund. Each account seeks to attain as high a level of current income as is consistent with the preservation of principle. This program is a great option to diversify investments!

**CCHI**  
Outreach and Enrollment Network  
www.cchi4families.org



**Mark Diel**  
mark@cchi.org  
(916) 404-9442

California Coverage & Health Initiatives (CCHI) is a statewide outreach and enrollment network, whose efforts ensure that all California's families are able to easily and effectively navigate into health coverage and other health services.

**Easy Smart Pay**  
Property Tax Payment Portal  
www.easysmartpay.net



**Easy Smart Pay™**

**Alan Fernandes**  
Alan@easysmartpay.net  
(916) 650-8120

Formed by the CSAC Finance Corporation, Easy Smart Pay is a platform built to modernize and simplify the process of paying government. ESP is a complementary bill pay service focused on providing automatic monthly payments to taxpayers for their property tax at the lowest industry rates. In addition to the partnership with the CSAC Finance Corporation, Easy Smart Pay partners with the NACo Financial Services Corporation and the California School Board Association. This program is currently being used in 28 of the 58 California counties and is now available for all counties to onboard.

**PRISM**  
Employee Benefits Solutions  
www.prismrisk.gov



**Rick Brush**  
Rbrush@prismrisk.gov  
(916) 850-7300

The Personal Lines Insurance Program (PLIP) provided by PRISM offers employees of PRISM members access to practical group savings on everyday insurance coverages. Available to all eligible PRISM members and their employees, council, commissioners and retirees, there is a solution and savings for many participants. The coverages provided include Automobile, Pet Insurance, Homeowners, Renters, Excess Liability/Umbrella to all the employees (including retirees), Condominium, Scheduled Personal Property, Recreation Vehicles, Watercraft, RV, Rental Properties, and more. Each public entity participating in a PRISM benefit program receives service support from a dedicated program management team.



**MUNICIPAL FINANCE  
& SERVICES CORP.**

**Municipal Finance & Services Corp.**

Accelerated Vender Payments and  
Cash Flow Solution  
www.mfsamerica.com



**Scott Chilson**

t.main@procureamerica.org  
(949) 388-2686

The Accelerated Municipal Payment (AMP) Program, administered by Municipal Finance & Services Corporation (MFSC), is a non-third-party accounts payable program provided to local government agencies at no cost to the local agency. Through the AMP Program vendors are paid in an expedited fashion by MFSC, typically within 72 hours from invoice approval, resulting in enhanced cash flow for both the local agency and its participating vendors. Local agencies also benefit from a streamlined and efficient accounts payable system and not having to pay against the invoice themselves until typically 60 days from MFSC’s payment of the invoice. The AMP Program’s accounts payable, document, and data management system not only prompt expedited payments to vendors but also afford the agency improved efficiency and transparency. The service also includes courtesy services that increase vendor diversity and participation. Vendor participation in the AMP Program is voluntary and therefore allows flexibility to vendors.



**PROCUREAMERICA**  
BUSINESS INTELLIGENCE SERVICES

**Procure America**

Business Intelligence Services  
www.procureamerica.org

**Todd Main**

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(949) 388-2686

Procure America provides its clients with analytics and strategies that result in greater performance at lower costs. By leveraging decades of industry experience, Procure America generates an average savings of 34%, all while increasing operational efficiency, vendor accountability, and service levels. Procure America’s experts have deep, industry-specific experience and will analyze all aspects of the supplier relationship-contractual, operational and invoice compliance. Knowledge, information and focus delivers results.



**CCA**

Cannabis Compliance  
www.cca.ca.gov

**Greg Turner**

gturner@cca.ca.gov  
(916) 526-7082

The California Cannabis Authority is a Joint Powers Authority established by county governments to develop and manage a statewide data platform. The platform will assist local governments that are regulating commercial cannabis activity by consolidating data from different channels into one resource to help local governments ensure maximum regulatory and tax compliance. In addition, the platform can help to facilitate financial services to the cannabis industry by linking willing financial institutions with interested businesses, and by providing critical data to ensure that all transactions and deposits are from legal transactions. As Counties look at establishing or revising their cannabis licensing and taxing structure, CCA should be among the resources used to ensure a successful and robust regulatory program.

## Coast2Coast Rx Card

### Coast2CoastRx

Discounted Prescription Drugs  
[www.coast2coastrx.com](http://www.coast2coastrx.com)

**Jim Manker**  
[Jim@csacfc.org](mailto:Jim@csacfc.org)  
(916) 650-8107

The Coast2Coast Discount Prescription Card is available at no-cost to the county or taxpayers and will save county residents up to 75% on brand name and generic prescription drugs. The Coast2Coast program is already being used by over 35 counties in California. Not only does it offer savings to users, your county will receive \$1.25 from Coast2Coast for every prescription filled by a cardholder.



### CSBA GAMUT

Agenda Management System  
<https://www.csba.org/gamut>

**James Collins**  
[jcollins@csba.org](mailto:jcollins@csba.org)  
(916) 669-3278

CSAC FC has partnered with the California School Board Association (CSBA) to bring the GAMUT platform to California Counties and other public agencies that allows for a virtual meeting minutes record keeping that conforms with the Brown Act. Agencies are able to use this simple yet robust software for meetings and policies as well as provide immediate public access and translates in more than 100 languages. The platform incorporates the needs of a virtual meeting environment with online voting and remote board access. Agencies can purchase the entire suite or select the module that best suits their governance team's needs.



### Synoptek

Cyber Security and Technology  
[www.synoptek.com](http://www.synoptek.com)

**Eric Westrom**  
[ewestrom@synoptek.com](mailto:ewestrom@synoptek.com)  
(916) 316-1212

The CSAC FC and Synoptek have partnered to offer a human firewall training program and fraud assessment. The human firewall program is a training program whereby a comprehensive approach is initiated that integrates baseline testing, using mock attacks, engaging interactive web-based training, and continuous assessment through simulated phishing attacks to build a more resilient and secure organization. Synoptek offers a wide range of security technology offerings to aid your county in remaining vigilant and secure.



### Public Surplus

Surplus Auction System  
[www.publicsurplus.com](http://www.publicsurplus.com)

**Don Clayton**  
[Donclayton@thepublicgroup.com](mailto:Donclayton@thepublicgroup.com)  
(801) 932-7000

Public Surplus is the best government surplus auction system available. Find great deals on heavy equipment, cars, buses and even airplanes. This system was created with unique capabilities specifically for public agencies, making it much more than an auction site. The services we offer to both buyers and sellers is of the highest quality with a strong focus on customer care.



**CashVest by Three + One**  
Liquidity Management Services  
www.threeplusone.us



**Garrett MacDonald**  
gam@threeplusone.us  
(585) 484-0311

CashVest® provides liquidity analysis and FinTech data services for counties and other public entities. This program is a new opportunity to help manage your organization's funds as a revenue-generating asset, identify the current marketplace value of your cash, and use time horizon data to maximize the value of all your financial resources.

**Treasury Curve**  
Financial Management Services  
www.treasurycurve.com



**Nancy Jerez**  
Nancy@treasurycurve.com  
(650) 521-5249

Treasury Curve was founded by a team of financial and technology innovators all-too-familiar with the pain treasury professionals face each day: How to efficiently manage both cash and investments, maximize idle cash and ensure compliance within strict investment policies. The result is a total solution designed to help you optimize your treasury, while giving you precious time back to optimize other areas in your finance and treasury areas.

## Board of Directors

- Oscar Villegas**, Yolo County - **President**
- Graham Knaus**, CSAC - **Vice President**
- Ryan Alsop**, Napa County - **Treasurer**
- Kathryn Barger**, Los Angeles County
- Richard Forster**, Amador County
- Elba Gonzalez-Mares**, Public Member
- Matt Jennings**, Riverside County
- Leonard Moty**, Public Member
- Susan Muranishi**, Alameda County
- Jack Pellegrino**, San Diego County
- Billy Rutland**, Public Member

## Staff

- Alan Fernandes** - Chief Executive Officer
- Rob Pierce** - Chief Operating Officer
- Jim Manker** - Director of Business Development
- Christy Higgins** - Director of Operations
- Chase Broffman** - Business Development Manager
- Sendy Young** - Executive Assistant





## PLATINUM Partners (as of 1.1.2024)

### **1. Alaska Airlines**

David Tucker, Managing Director  
1350 Old Bayshore Hwy, Suite 205 Burlingame,  
CA 94010  
(510) 734-1000  
[david.tucker1@alaskaair.com](mailto:david.tucker1@alaskaair.com)  
[www.news.alaskaair.com](http://www.news.alaskaair.com)

### **2. Anthem Blue Cross**

Michael Pro시오, Regional Vice President, State  
Affairs  
1121 L Street, Suite 500  
Sacramento, CA 95814  
(916) 403-0527  
[Michael.prosio@anthem.com](mailto:Michael.prosio@anthem.com)  
[www.anthem.com](http://www.anthem.com)

### **3. Baron & Budd**

John Fiske, Shareholder  
11440 W. Bernardo Court  
San Diego, CA 92127  
(858) 251-7424  
[jfiske@baronbudd.com](mailto:jfiske@baronbudd.com)  
[www.baronandbudd.com](http://www.baronandbudd.com)

### **4. Blue Shield**

Andrew Kiefer, VP, State Government Affairs  
1215 K St. Suite 2010  
Sacramento, CA 95815  
(916) 552-2960  
[Andrew.keifer@blueshieldca.com](mailto:Andrew.keifer@blueshieldca.com)  
[www.blueshieldca.com](http://www.blueshieldca.com)

### **5. California Statewide Communities Development Authority**

Catherine Barna, Executive Director  
1700 North Broadway, Suite 405  
Walnut Creek, CA 94596  
(800) 531-7476  
[cbarna@cscda.org](mailto:cbarna@cscda.org)  
[www.cscda.org](http://www.cscda.org)

### **6. CalTRUST**

Laura Labanieh, CEO  
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Sacramento, CA 95814  
(916) 745-6701  
[laura@caltrust.org](mailto:laura@caltrust.org)  
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### **7. CCHI**

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[mdiel@cchi4families.org](mailto:mdiel@cchi4families.org)  
[www.cchi4families.org](http://www.cchi4families.org)

### **8. Coast2Coast Rx**

WellDyne Rx (dba Coast2Coast Rx)  
Michael Amiet, Chief Supply Chain Officer  
500 Eagles Landing Rd  
Lakeland, FL 33810  
(919) 451-1555  
[mamiet@welldynernx.com](mailto:mamiet@welldynernx.com)  
[www.coast2coastrx.com](http://www.coast2coastrx.com)

### **9. Deloitte & Touche LLP**

Vanessa Vacca, Managing Director  
1919 N. Lynn Street  
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(949) 375-2579  
[vavacca@deloitte.com](mailto:vavacca@deloitte.com)  
[www.deloitte.com](http://www.deloitte.com)

### **10. Dominion Voting Systems**

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26561 Amhurst Court  
Loma Linda, CA 92354  
(909) 362-1715  
[steven.bennett@dominionvoting.com](mailto:steven.bennett@dominionvoting.com)  
[www.dominionvoting.com](http://www.dominionvoting.com)

### **11. DRC Emergency Services**

Kristy Fuentes, Vice President Business  
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110 Veterans Memorial Blvd.  
Metairie, LA 7005  
(504) 220-7682  
[kfuentes@drcusa.com](mailto:kfuentes@drcusa.com)  
[www.drcusa.com](http://www.drcusa.com)

**12. Enterprise Fleet Management**

Lisa Holmes, State of CA Contract Manager  
150 N. Sunrise Ave  
Roseville, CA 95661  
(916) 240-1169  
[Lisa.m.holmes@ehi.com](mailto:Lisa.m.holmes@ehi.com)  
[www.enterprise.com](http://www.enterprise.com)

**13. GX Broadband**

Ben Korman, Founder  
P.O. Box 1869  
Morro Bay, CA 93443  
(805) 748-6824  
[ben@gxbroadband.com](mailto:ben@gxbroadband.com)  
[www.gxbroadband.com](http://www.gxbroadband.com)

**14. Haggerty Consulting**

Jessi Widhalm, Communications Director  
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[www.Hagertyconsulting.com](http://www.Hagertyconsulting.com)

**15. IBM**

Todd W. Bacon, VP / Managing Director  
425 Market St. 21st floor  
San Francisco, CA 94105  
(310) 890-9535  
[tbacon@us.ibm.com](mailto:tbacon@us.ibm.com)  
[www.ibm.com](http://www.ibm.com)

**16. Kaiser Permanente**

Jennifer Scanlon, Managing Director,  
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Oakland, CA 94612  
(510) 987-2373  
[Jennifer.Scanlon@kp.org](mailto:Jennifer.Scanlon@kp.org)  
[www.kp.org](http://www.kp.org)

**17. Library Systems & Software**

Michael Posey, Government Affairs  
2600 Tower Oaks Blvd., Suite 510,  
Rockville, MD 20852  
(714) 412-0174  
[michael.posey@lsslibraries.com](mailto:michael.posey@lsslibraries.com)  
[www.lsslibraries.com](http://www.lsslibraries.com)

**18. Mosaic Solutions and Advocacy**

Matt Cate, Founding Partner  
808 R Street Suite 102  
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(916) 862-4245  
[mcate@mosaicso.com](mailto:mcate@mosaicso.com)  
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**19. Municipal Finance & Services Corporation**

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1401 H Street, Suite 875  
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(732) 852-7885 ext. 1001  
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**20. Nationwide**

Rob Bilo, VP of Business Development  
492 Robert J Mathews Parkway, Suite 100  
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(86) 677-5008  
[bilir@nationwide.com](mailto:bilir@nationwide.com)  
[www.nrsforu.com](http://www.nrsforu.com)

**21. NextEra Energy**

Trystine Payfer, Western Region, Community  
Engagement Manager.  
1 California Street, Suite 1600  
San Francisco, CA 94111  
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[Trystine.Payfer@nexteraenergy.com](mailto:Trystine.Payfer@nexteraenergy.com)  
[www.nexteraenergy.com](http://www.nexteraenergy.com)

**22. Oracle**

Megan Jaskiewicz  
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[megan.jaskiewicz@oracle.com](mailto:megan.jaskiewicz@oracle.com)  
[www.oracle.com/government/state-local/](http://www.oracle.com/government/state-local/)

**23. Pacific Gas & Electric Company**

John Costa, Local Public Affairs  
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(916) 584-1885  
[JB1F@pge.com](mailto:JB1F@pge.com)  
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**24. Peraton**

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[julie.waddell@mail.peraton.com](mailto:julie.waddell@mail.peraton.com)  
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**25. PRISM**

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(916) 850-7378  
[rbrush@prismrisk.gov](mailto:rbrush@prismrisk.gov)  
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**26. Procure America**

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[www.procureamerica.org](http://www.procureamerica.org)

**27. Prologis**

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[www.prologis.com](http://www.prologis.com)

**28. SiteLogIQ**

Maram Finnell, Sr. Marketing Manager  
1651 Response Rd, Suite 300  
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[maram.finnell@sitelogiq.com](mailto:maram.finnell@sitelogiq.com)  
[www.sitelogiq.com](http://www.sitelogiq.com)

**29. SLS**

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[jcontorno@sls-health.com](mailto:jcontorno@sls-health.com)  
[www.sls-health.com](http://www.sls-health.com)

**30. Southland Industries**

Desiree Haus, Business Development Manager  
12131 Western Ave.,  
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(559) 593-3902  
[dhaus@southlandind.com](mailto:dhaus@southlandind.com)  
[www.southlandind.com](http://www.southlandind.com)

**31. 211 California**

Alana Hitchcock, Executive Director & CEO  
110 W 6th Street #59  
Azusa, CA 91702  
(925) 286-5250  
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[www.211california.org](http://www.211california.org)

**32. Unite Us**

Moira Kenney, Regional Network Director, West Coast  
10331 Jefferson Blvd.  
Culver City, California 90232  
(510) 637-8153  
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[www.uniteus.com](http://www.uniteus.com)

**33. Vanir Construction Management, Inc.**

Bob Fletcher, Vice President of Business Development  
4540 Duckhorn Drive, Suite 300  
Sacramento, CA 95834  
(916) 997-3195  
[bob.fletcher@vanir.com](mailto:bob.fletcher@vanir.com)  
[www.vanir.com](http://www.vanir.com)

**34. Western States Petroleum Association**

Catherine Reheis-Boyd, President  
1415 L St., Suite 600  
Sacramento, CA 95816  
(916) 498-7752  
[creheis@wspa.org](mailto:creheis@wspa.org)  
[www.wspa.org](http://www.wspa.org)



## GOLD Partners

### **1. Alliant Insurance Services, Inc.**

Nazi Arshi, Senior Vice President  
1301 Dove St. Suite 200  
Newport Beach, CA 92660  
(949) 660-8110  
[narshi@alliant.com](mailto:narshi@alliant.com)  
[www.alliant.com](http://www.alliant.com)

### **2. DLR Group**

Dan Sandall, Business Development  
1050 20th Street, Suite 250  
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(310) 804-7997  
[dsandall@dlrgroup.com](mailto:dsandall@dlrgroup.com)  
[www.dlrgroup.com](http://www.dlrgroup.com)

### **3. Election Systems & Software**

Chelsea Machado, Regional Sales Manager  
11208 John Galt Blvd.  
Omaha, NE 68137  
(209) 277-6674  
[chelsea.machado@essvote.com](mailto:chelsea.machado@essvote.com)  
[www.essvote.com](http://www.essvote.com)

### **4. EY**

Jeff Reynolds, Assistant Director  
731 K. Street, Suite 300  
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(762) 262-7088  
[Jeff.reynolds@ey.com](mailto:Jeff.reynolds@ey.com)  
[www.ey.com/en\\_us/government-public-sector/services](http://www.ey.com/en_us/government-public-sector/services)

### **5. HdL Companies**

Andrew Nickerson, President  
120 S. State College Blvd., Suite 200  
Brea, CA 92821  
(714) 879-5000  
[anickerson@hdlcompanies.com](mailto:anickerson@hdlcompanies.com)  
[www.hdlcompanies.com](http://www.hdlcompanies.com)

### **6. Hipcamp**

Michal Rosenoer, Lead Manager, Government and Community Relations  
2261 Market Street #4139,  
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(828) 577-3541  
[micha@hipcamp.com](mailto:micha@hipcamp.com)  
[www.hipcamp.com](http://www.hipcamp.com)

### **7. OpenGov**

Greg Balter, CPA  
Regional Sales Manager, US - West  
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[gbalter@opengov.com](mailto:gbalter@opengov.com)  
[www.opengov.com](http://www.opengov.com)

### **8. Paragon Government Relations**

Joe Krahn, President  
220 Eye Street, NE, Suite 240  
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(202) 898-1444  
[jk@paragonlobbying.com](mailto:jk@paragonlobbying.com)  
[www.paragonlobbying.com](http://www.paragonlobbying.com)

### **9. Persimmony International**

Ruffin Judd, Director of Customer Success  
26895 Aliso Creek Rd.  
Aliso Viejo, CA 92656  
(208) 351-1413  
[ruffin.judd@persimmony.com](mailto:ruffin.judd@persimmony.com)  
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### **10. Qlik**

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March 7, 2024

**TO:** CSAC Board of Directors

**FROM:** Chastity Benson | Chief Operating Officer  
Farrah McDaid Ting | Director of Member Engagement

**SUBJECT:** Member Services and Operations Report

**Legislative Conference**

The 2024 Legislative Conference is set to make a return to Sacramento County from April 17-19, offering an extended agenda over three days. The comprehensive program encompasses policy committee meetings, enlightening workshops, engaging discussions with key legislative representatives, and a co-sponsored reception with the League of California Cities. Registration is currently open, and we strongly encourage counties to participate for a thorough overview of crucial state and federal legislation, as well as ballot initiatives. Furthermore, this event serves as an ideal platform to arrange meetings with your respective legislative delegation, providing a valuable opportunity to advocate on key issues affecting your communities.

**Regional Meeting**

We are delighted to announce the return of our highly anticipated regional meeting series. Our first gathering will take place in Imperial and Riverside Counties on March 13-14. This event, the first of three planned regional meetings in 2024, will delve into the theme of sustainable economic development at the local level.

Attendees will have the unique opportunity to explore Lithium Valley, recognized globally as a premier destination for lithium production. With enough mineral resources to power over 375 million electric vehicle batteries—exceeding the total number of vehicles on U.S. roads—Lithium Valley represents a pivotal hub in the transition to sustainable energy solutions. Additionally, CSAC will curate thought-provoking panel discussions led by industry experts, providing valuable insights and fostering collaborative dialogue. Attendees will also be encouraged to share their own strategies for fostering local and equitable economic growth.

Looking ahead, our second regional meeting is scheduled to be held in Alameda County on June 20-21, focusing on the transformative impact of Artificial Intelligence. Stay tuned for further details as we approach the event date and join us in shaping the future of county initiatives and innovation.

**Telling the County Story**

Counties stand at the forefront of maintaining and delivering essential constituent services, and CSAC actively seizes every opportunity to showcase this vital work. Across our dynamic array of social media platforms—X (formerly Twitter), Facebook, Instagram, and LinkedIn—and through our weekly digital bulletin ([subscribe here](#)), we amplify the commendable efforts transpiring at the county level. Emphasizing the importance of having a seat at the table for the county perspective, we strive to underscore the significant role counties play in shaping communities.



Highlighting our commitment to advocacy and impactful representation, two noteworthy instances unfolded in February. CSAC First Vice President and Inyo County Supervisor Jeff Griffiths traveled to Washington, D.C. to participate in a press conference urging Congress to extend funding for the Affordable Connectivity Program (ACP). This collaborative effort, organized by the National Association of Counties (NACo), brought together influential figures, including California Representative Norma Torres. The event highlighted broadband's essential role and illuminated challenges in remote desert and mountain communities, where establishing infrastructure is both difficult and expensive. In another impactful moment, CSAC Executive Committee Member and Monterey County Supervisor Luis Alejo represented California counties in a press conference announcing the reintroduction of Senator Alex Padilla's Housing for All Act. This legislation, mirroring CSAC's AT HOME plan, offers a collaborative approach to addressing the homelessness crisis. We extend our heartfelt gratitude to both First Vice President Griffiths and Supervisor Alejo for generously dedicating their time and efforts to these crucial endeavors.

As you engage in projects that underscore the critical role of county government, we encourage you to share your stories with CSAC staff. By doing so, not only will CSAC spotlight your county's exemplary work on our digital channels, but we may also showcase your program as an example in pivotal advocacy discussions. To share your story of county excellence, please reach out to Director of Member Engagement Farrah McDaid Ting at [fmcting@counties.org](mailto:fmcting@counties.org).

March 7, 2024

**To:** CSAC Board of Directors  
**From:** Paul Danczyk, Chief Operating Officer  
**Subject:** California Counties Foundation Report

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The California Counties Foundation strives to advance excellence in county government by providing educational opportunities and support services to CSAC members. The following report includes Institute updates, CSAC Grants Initiative updates, additional efforts, and staff updates.

## Institute Updates

### Alameda County Graduation

CSAC leadership proudly joined Alameda County Supervisors and the executive team in celebrating the recent graduation of 28 Alameda County executives and senior administrators. The Alameda campus was virtual in 2023. The graduates join a California network of nearly 1,500 alumni who hold CSAC credentials.



*CSAC Leadership joins Supervisors Haubert (District 1), Marquez (District 2), Tam (District 3), Miley (District 4) and Carson (District 5), and CAO Muranishi to celebrate staff's Executive Credential accomplishments.*

## Winter/Spring Courses

The Institute commenced registration for Winter/Spring Classes, which currently stands at 2254 enrolled participants. Cohorts that launched or will launch in 2024 include:

- California County Information Services Directors Association (CCISDA) – continuing jointly in 2024.
- Humboldt County – Cohort 3 launched January 11, 2024
- Fresno County – Cohort 3 launched January 19, 2024
- Inyo County – Launched January 25, 2024
- Mariposa County – Launched on February 22, 2024
- Orange/Riverside – Cohort 2 launching jointly in September 2024
- Butte, Glenn, and Colusa Counties – Launching jointly in September 2024
- New Supervisors Institute – Launching November 17-19, 2024
- County Personnel Administration Association of California (CPAAC) – Launching September 2024



**Supervisor Griffiths welcomes senior Inyo staff to the CSAC Institute campus.**

## New Supervisors Institute

We are looking forward to the New Supervisors Institute for 2024-25. The biennial program is designed for newly appointed or elected Supervisors to aid in their understanding of county governance and to build community. Participants will have the opportunity to develop a network amongst fellow new supervisors that will serve them throughout their career. This course will give them the tools they need to hit the ground running as they take office in serving their communities.

The in-depth seminars will take place on:

Session I : November 17-19, 2024, CSAC Annual Meeting

Session II : February 20-21, 2025, Sacramento

Session III : July 17-18, 2025, Sacramento

Reunion : December 2, 2025, CSAC Annual Meeting

### County Personnel Administration Association of California (CPAAC)

We are excited to partner with the County Personnel Administrators Association of California to offer the inaugural HR Directors Institute. This program is designed for current and emerging human resource directors from both within HR departments and other county departments, with a particular emphasis on succession planning. The goals are twofold: expand application of public service leadership principles and strengthen the California county personnel administrator network. The course will include a 4-day residency in Santa Barbara on October 22 through 25, plus 3 virtual courses to tailor participant experiences.

#### Institute Courses

The Institute is offering nine virtual courses for the Winter/Spring 2024 term across three learning tracks: Leadership, Governance, and Information Technology. Three courses are completed; the following courses are on deck for the remaining session.

- March 7 - Personal Leadership & Team Dynamics (Leadership); Instructor: Santor Nishizaki
- March 28 - Engaging Employees for Success (Governance); Instructor: Frank Benest
- April 4 - IT Organizational Design (IT); Instructor: Steve Monaghan
- April 25 - Labor Relations and Negotiations (Governance); Instructors: Tami Douglas-Schatz and Sarah Carrillo
- May 24 - Increase Organizational Maturity to Drive Innovation, Performance, and Sustainability (Leadership); Instructors: Steve Monaghan and Laree Kiely
- June 13 - IT Define an IT Strategy and Roadmap (IT); Instructor: Liza Massey

#### Realignment 101

In addition to these cohorts and virtual courses, the Institute continues to provide diverse programming that remains available to all CSAC members for professional development. We will offer two sessions of our most popular course -- Realignment 101 -- in Santa Ana, April 3-4 and in Sacramento, October 3-4.

## CSAC Grants Initiative

The CSAC Grants Initiative continues to go strong with free and premium services. Free services include weekly grant updates, pro bono office hours with The Ferguson Group, and quarterly webinars.

Five counties currently receive premium or a-la-carte services, including Imperial, San Luis Obispo, Ventura, Inyo, and Humboldt.

This year, the California Counties Foundation and The Ferguson Group will hold a series of webinars on a variety of topics related to grant application, strategy, and implementation. 2024 webinars will take place on March 21, May 16, August 1, and September 19. Of particular note, the May 16 webinar will be geared towards County Supervisors, to learn more about the federal and state grant trends and strategy considerations.

# CSAC Grants Initiative

## UNLOCKING EXTERNAL FUNDING

### Member Resources for Free Grant Assistance



#### Office Hours

[Click here](#) to schedule a half-hour appointment and receive no-cost consulting support. Our grant experts will use the call to clarify your county's strategic goals, program challenges, and/or funding gaps and follow up with expert advice, grant guides, and successful applications, if available and relevant.



#### Successful Applications

[Click here](#) to email our grant experts. Tell them about the specific grant or type of grant you're targeting and they'll share successful application from our catalogue of 1,500 examples, if available and relevant.



#### Weekly Grant Updates

[Click here](#) to join the more than 550 other county leaders by subscribing to our weekly list of new grant opportunities.



#### Grant Application Webinars

Watch our training webinars to help you better understand and effectively seek funding opportunities.

Archived webinars:

**Grants 101** – tips on the federal grant process – [watch here](#) and [view slides here](#)

**Grants 102** – deeper dives into federal applications and strategies – [watch here](#) and [view slides here](#).

**Homelessness and Housing Grants** – covering federal funding from DOJ, HUD, HHS, USDA, and other agencies – [watch here](#), [view slides here](#).

**Water and Transportation Infrastructure Grants** – covering federal grants and loans for infrastructure projects – [watch the transportation section here](#), [watch the water section here](#), [watch the infrastructure grant strategy section here](#), or [watch in full here](#) or [view slides here](#).



OPTIONAL SERVICES	TIER 1	TIER 2	TIER 3	TIER 4
	\$50K	\$100K	\$250K	\$500K
CONSULTING HOURS For dedicated support.	140 Hours	280 Hours	660 Hours	1,500 Hours
NEEDS ASSESSMENT For strategic planning.	✓	✓	✓	✓
GRANT TRACKING For timely information.	✓	✓	✓	✓
GRANT TRAINING For added capacity.	✓	✓	✓	✓
PROJECT PLANNING For funding strategies.	X	Up to 3 projects	Up to 6 projects	Up to 10 projects
GRANT WRITING For full applications.	X	Up to 4 grants	Up to 8 grants	Up to 16 grants

**/ A LA CARTE SERVICES /**  
 These or similar services are also available on an as-needed basis.

**Additional Efforts**



*The Foundation extends CETF Partnership.*

As the Foundation concludes its first year of partnership with the California Emerging Technology Fund (CETF), discussions are actively progressing to broaden the collaboration. Despite the Federal Communications Commission (FCC) imposing a freeze on the Affordable Connectivity Program, the Foundation is actively exploring avenues to assist CETF in advancing its other Internet for All initiatives.

With the recent approval of resolution H.R. 6929/S. 3565, the congressional effort to fund ACP through December 2024, the Foundation anticipates an enhanced opportunity to underscore the significance of both ACP and the partnership with CETF.

## Staff Updates



Faith Emmert-Sanchez has joined the Foundation Team as the Training Program Coordinator. In this role, she supports onsite and virtual Institute courses, including campuses recently launched in Riverside/Orange, Inyo, Monterey, Fresno, Mariposa, and Humboldt Counties. Her experience in social media marketing, project management and event coordination add another layer of professionalism to our work.

Amber Tarrac, who was the Institute Project Manager, transitioned from the team. We thank Amber for aiding us this Fall and wish her the best of luck in her future endeavors.

We are recruiting for two positions: Institute Manager and Special Projects Manager. More information can be found at the CSAC website, [www.counties.org](http://www.counties.org).



# County Counsels' Association of California

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Jennifer Bacon Henning

## MEMORANDUM

**To:** Supervisor Bruce Gibson, President, and  
Members of the CSAC Board of Directors

**From:** Jennifer Bacon Henning, Litigation Coordinator

**Date:** March 7, 2024

**Re:** Litigation Coordination Program Update

This memorandum will provide you with information on the Litigation Coordination Program's new case activities since the Board's April 2023 meeting. Briefs filed on CSAC's behalf are available at: <http://www.counties.org/csac-litigation-coordination-program>.

The following jurisdictions are receiving amicus support in the new cases described in this report:

COUNTIES	CITIES	OTHER AGENCIES
El Dorado Los Angeles (3 Cases) San Bernardino San Francisco Santa Clara Siskiyou Tulare	Berkeley Canyon Lake Corona Coronado Culver City Grants Pass, OR Los Angeles Monterey Oakland Palo Alto San Diego Stockton Vallejo	Alameda Health System Central Coast Community Engery Coachella Valley Water Dist (2 Cases) Newhall School District Regents of UC State Legislature

### ***Andersson v. Newhall School District***

Unpublished Opinion of the Second Appellate District, 2023  
Cal.App.Unpub.LEXIS 4197 (2d Dist. July 18, 2023)(B315894), *petition for review denied* (Sept. 27, 2023)(S281585)

Status: Case Closed

Plaintiff brought this action under Labor Code section 1102.5 alleging that her negative performance evaluation was retaliation for her disclosure concerning her supervisor's poor conduct. The trial court granted summary



March 7, 2024

judgment to defendants, concluding that because the information plaintiff disclosed was already known to the school district, it was not a protected disclosure under 1102.5. After the trial court's ruling, the Supreme Court issued its decision in *People ex rel. Garcia Brower v. Kolla's, Inc.* (2023) 14 Cal.5th 719, concluding that protected disclosures include information that was already known to the employer or government agency to which it was disclosed. In light of *Kolla's*, the Court of Appeal in this case concluded the trial court's reasoning was in error. Nevertheless, in an unpublished opinion, the Court of Appeal upheld summary judgment in favor of defendants, finding that the school district demonstrated by clear and convincing evidence that plaintiff would have received a negative performance review for legitimate and independent reasons. CSAC sought publication of this opinion, but the request was denied.

***Beck v. City of Canyon Lake***

Pending in the Fourth District, Division Two (filed Sept. 19, 2023)(E082164)

Status: Amicus Brief Due April 8, 2024

The City of Canyon Lake adopted a utility user's tax (UUT) on water, sewer and other utility services. Plaintiff challenged the UUT as a general tax imposed as "an incident of property ownership," which is barred by Prop. 218. The trial court agreed, rejecting the City's argument that the UUT was approved by the voters and is a valid imposition of fees on the users and use of services unrelated to property ownership. The threshold question is whether the UUT is a tax, assessment, fee, or charge assessed upon any parcel of property located within the City or upon any person as an incident of property ownership. The city argued that just because water or sewer service is a "property related service," it does not share the same meaning as a fee imposed "as an incident of property ownership." The court disagreed, holding instead: "The UUT is not imposed on a particular activity at a property, but upon persons using water and sewer services as incident of property ownership, and the UUT will only cease to be imposed upon a person when the ownership changes hands, and the UUT would still be imposed against the new owner. In conclusion, the UUT is a general tax imposed on parcel or upon a person 'as an incident of property ownership,' which is subject to the constitutional restriction under article XIII D, section 3." The court went on to find that the fact that the UUT had been approved by the voters did "not itself rescue the imposition of such fee or tax from an independent constitutional violation of article XIII D." CSAC will file a brief in support of the City.

***Boyd v. Central Coast Community Energy***

96 Cal.App.5th 136 (6th Dist. Oct. 4, 2023)(H050140), *petition for rehearing denied* (Oct. 31, 2023), *petition for review and request for depublication pending* (Jan. 10, 2024)(S282671)

Status: Case Closed

Central Coast Community Energy (3CE) is a Community Choice Aggregator (CCA). This case challenges 3CE's rates as unlawful taxes under Prop. 26 because they were not approved by the electorate. 3CE argued, and the trial court agreed, that: (1) The rates are not taxes under Prop. 26 because they are not "imposed" on the rate payers, which have the choice to obtain power through PG&E instead; and (2) Even if the rates fall within the definition of taxes under Prop. 26, they fall within the exemption that covers charges for services or products that do not exceed reasonable costs. On appeal, the Sixth District partially affirmed. Disagreeing with the trial

March 7, 2024

court, the Court of Appeal first determined that the rates fall within “the general definition of taxes because they are ‘imposed’ under the Supreme Court’s long-standing interpretation of that term.” Citing to *Zolly v. City of Oakland*, the court noted that the Supreme Court has relied on the ordinary definition of the term “impose” as meaning merely to “establish.” Under the standard, “the rates established by 3CE are charges imposed by a local government and therefore fall within Article XIII C’s general definition of taxes” notwithstanding the fact that customers can opt out of the rates and choose to receive power from a privately owned utility instead. The court, again relying on *Zolly*, found that there is no coercive element to the term “impose” in Prop. 26. However, the court went on to agree with the trial court that the rates fall within the exception to the definition of taxes covering charges for services or products that do not exceed reasonable costs. CSAC supported 3CE’s request for republication, but the request was denied.

***California Restaurant Association v. City of Berkeley***

65 F.4th 1045 (9th Cir. Apr. 17, 2023)(21-16278), *petition for rehearing denied* (Jan. 2, 2024)

Status: Case Closed

The City Berkeley adopted an ordinance prohibiting natural gas infrastructure in any new building applying for permits after January 1, 2020. The California Restaurant Association (CRA) challenged the ordinance as preempted by the federal Energy Policy and Conservation Act (EPCA), which concerns the energy use and efficiency standards for specified appliances. CRA alleged that the Ordinance improperly regulates EPCA-covered appliances by essentially requiring EPCA-covered appliances to consume zero natural gas. The trial court upheld the ordinance. On appeal, the Ninth Circuit reversed, holding that the EPCA preempts the ordinance. The court noted that the EPCA expressly preempts State and local regulations concerning the energy use of many natural gas appliances. It then determined that the City’s ordinance “took a more circuitous route to the same result” by prohibiting natural gas piping into those buildings, rendering the gas appliances useless. Thus, “by its plain text and structure, the Act’s preemption provision encompasses building codes that regulate natural gas use by covered products. By preventing such appliances from using natural gas, the Berkeley building code did exactly that.” The City sought rehearing en banc, which CSAC supported on the limited issue of the proper application of federal preemption principles, but rehearing was denied.

***City of Grants Pass v. Johnson***

50 F.4th 787 (9th Cir. Sept. 28, 2022)(20-35752), *cert. petition granted* (Jan. 12, 2024)(23-175)

Status: Amicus Brief Due March 4, 2024

In *Martin v. City of Boise*, the Ninth Circuit Court of Appeals found that the Eighth Amendment’s prohibition against cruel and unusual punishment prevented the City of Boise from enforcing anti-camping ordinances with criminal penalties against persons who are involuntarily homeless (i.e., there is no adequate shelter space available for the individual). In such a case, the court concluded that enforcing the ordinance would amount to criminalizing the status of being homeless, which the court concluded is cruel and unusual punishment for purposes of the Eighth Amendment. CSAC filed a brief urging the United States Supreme Court to review the case, but review was denied.

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Since *Martin*, the courts have struggled to define the contours of the Eighth Amendment in this context as they have attempted to address a multitude of questions raised by *Martin*: Does the shelter space have to be within the same jurisdiction? Does it have to be indoors or can the city or county require removal to a camping site or other location? What is the minimum level of shelter / services required to meet the standard? Does there have to be enough shelter space for all homeless persons in a jurisdiction, or is it sufficient that the person subject to enforcement is offered viable shelter?

The present case, *City of Grants Pass v. Johnson*, is one of the cases attempting to address these issues. Here, the Ninth Circuit certified a class action against the City and enjoined the City from enforcing its ordinances prohibiting camping and the possession of bedding material on all public property. After noting that there was not adequate shelter space to accommodate all the City's unhoused persons, the court went on to expand *Martin* by applying the Eighth Amendment to an entire class of unhoused persons, and to apply it even though only civil (not criminal) citations had been issued. The City sought rehearing in the Ninth Circuit, which CSAC supported, but review was denied.

The United States Supreme Court has now agreed to hear this case. Specifically, the Court will consider the following question: "Whether the enforcement of generally applicable laws regulating camping and sleeping on public property constitute "cruel and unusual punishment" prohibited by the Eighth Amendment of the Constitution." CSAC will file a brief in support of the City of Grants Pass.

***City of Los Angeles v. Superior Court (Casa Greene)***

Writ Petition Summarily Denied by the Court of Appeal, Second District (Dec. 14, 2023), *petition for review pending* (filed Dec. 26, 2023)(S283226)

Status: Petition for Review Pending

In this case, the plaintiff landlords alleged (among other things) that COVID-19 eviction protections were per se takings of their property under both the United States and California constitutions, and that those protections also violated both constitutions' prohibitions on impairing contract obligations. Along with the City, the Casa Greene plaintiffs have sued the State, Los Angeles County, and the cities of Agoura Hills, Beverly Hills, Burbank, Glendale, Santa Clarita, Santa Monica, and West Hollywood. The City has successfully defeated similar claims in federal court and the large majority of federal courts to rule on these theories over the past few years are in accord. Nevertheless, the trial court here ruled against the City, concluding that the landlords stated claims both for impairing their contracts with their tenants and for physical, per se takings of the landlords' property. All of the defendants sought writ relief in the Court of Appeal, but the petition was summarily denied. The City is seeking Supreme Court review, and CSAC has filed a letter in support. The petition is pending.

***Coronado Citizens for Transparent Government v. City of Coronado***

Pending in the Fourth Appellate District, Division One (filed May 24, 2023)(D082360)

Status: Amicus Brief Due March 1, 2024

The City of Coronado proposed the development of a Recycled Water Project to ween its municipal golf course off of potable water. Plaintiffs, who are adjacent neighbors, filed this CEQA lawsuit over concerns that the Mitigated Negative Declaration's (MND) analysis of seismic and aesthetics impacts of the project was

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insufficient. The trial court ruled in plaintiff's favor: (1) finding an MND cannot rely upon regulations to ensure seismic impacts are less than significant; (2) refusing to consider the beneficial components of the project and their ability to offset impacts; and (3) refusing to adopt the City's credibility findings as to plaintiff's lay opinions, notwithstanding that courts are supposed to "give [agency] the benefit of [the] doubt on any legitimate, disputed issues of credibility. The lead agency has discretion to determine whether evidence offered by the citizens claiming a fair argument exists meets [the Act's] definition of 'substantial evidence.'" The trial court gave no such deference. CSAC will file a brief in support of the City on appeal.

***County of Santa Clara v. Public Employment Relations Board***

Pending in the Sixth District Court of Appeal (filed Nov. 5, 2023)(H051570)

Status: Amicus Brief Due May 30, 2024

During the COVID-19 pandemic, the County of Santa Clara declared a local emergency and deployed many County employees, who are disaster service workers (DSWs) pursuant to Government Code § 3100, to numerous disaster service activities. Specifically for purposes of this case, the County deployed union-represented nurses to a private skilled nursing facility that was on the brink of collapse due to inadequate staffing, and deployed other union-represented employees to local motels and hotels that were being used as temporary, non-congregate homeless shelters. The County took the position that pursuant to the declaration of paramount state interests and police powers provided in § 3100, as well as County employees' legal status as DSWs, the assignments did not constitute a change in terms and conditions of employment; and, even if it did, the change fell outside the scope of bargaining. PERB disagreed and determined that the assignment of disaster service activities to public sector employees falls within the scope of required bargaining. CSAC will file a brief in support of Santa Clara County in its appeal.

***Crescent Trust v. City of Oakland***

90 Cal.App.5th 805 (1st Dist. Mar. 23, 2023)(A162465), *petition for review granted* (July 12, 2023)(S280234)

Status: Amicus Brief Due March 21, 2024

In this Antiquated Subdivision Map Act case, the Court of Appeal rejected existing case law and held instead that antiquated parcels of five or less created prior to 1839 do not have to be separately conveyed in order to be a legal separate lot. As such, the Court concluded that plaintiff, which owed a lot created in 1854 that had never been conveyed as a separate lot, was entitled to a certificate of compliance that would allow him to sell or develop the parcel as a matter of right. The Supreme Court has granted the City's Petition for Review, which CSAC supported. CSAC will now file an amicus brief on the merits in this case.

***Duarte v. City of Stockton***

60 F.4th 566 (9th Cir. Feb. 16, 2023)(21-16929), *petition for certiorari denied* (June 26, 2023)(22-1080)

Status: Case Closed

Plaintiff was arrested by City of Stockton police officers who allegedly pushed him to the ground and treated him roughly during the arrest. He pled no contest to willfully resisting arrest. In lieu of immediately entering the plea, the state court held the plea in abeyance for six months and offered him a diversion program instead.

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Ultimately he completed the diversion and the charges against him were dismissed. He then filed this civil action alleging false arrest and excessive force. The trial court held that the claims were barred by *Heck v. Humphrey*, which prohibits a would-be plaintiff from filing a civil action against law enforcement related to an event for which they pled guilty or were convicted. The Ninth Circuit reversed. The panel held that the *Heck* bar does not apply in a situation where criminal charges are dismissed after entry of a plea that was held in abeyance pending the defendant's compliance with certain conditions. The panel rejected the City's argument that by pleading no contest and completing the conditions of his agreement with the prosecution, plaintiff was functionally convicted and sentenced, holding instead that the *Heck* bar requires an actual judgment of conviction, not its functional equivalent. The City sought US Supreme Court review, which CSAC supported, but review was denied.

***Gajanan v. City and County of San Francisco***

Pending in the First Appellate District (filed July 26, 2023)(A168328)

Status: Amicus Brief Due April 22, 2024

Plaintiffs are owners and operators of six San Francisco boutique hotels that sought a refund of approximately \$1.9 million in tax penalties imposed by the City after Plaintiffs failed to file returns and pay transit occupancy taxes for a full calendar year. Ultimately, a Court of Appeal affirmed a judgment in favor of plaintiffs concluding they used ordinary care in reasonably relying on an employee who hid his failure to file returns and remit taxes. Plaintiffs thereafter filed a motion seeking over \$7 million under the private attorney general statute, Code of Civil Procedure section 1021.5, which included a multiplier, arguing they qualified for 1021.5 fees because their litigation enforced an important public right that benefited a large class of persons. The trial court denied the multiplier, but otherwise granted judgment in favor of plaintiffs, awarding over \$5 million in attorney's fees. The trial court concluded that the decision enforced an important public right because it interpreted the term "ordinary care" and prompted the City to amend its penalty structure, even though the substantive changes made by the City to its ordinance were not the relief Plaintiffs sought in their litigation, and the amendment process began well before this litigation started. CSAC will file a brief in support of the City on appeal.

***Hamilton and High v. City of Palo Alto***

89 Cal.App.5th 528 (6th Dist. Mar. 20, 2023)(H049425), *petition for review denied*

(July 19, 2023)(S279718)

Status: Case Closed

A developer of a mixed use project in downtown Palo Alto opted to provide only 24 of 40 required parking spaces to avoid the cost of subgrade parking below the groundwater table. It paid about \$900k in in-lieu fees 2013. The City did not treat the in lieu fee as a Mitigation Fee Act (AB 1600) fee and therefore did not consistently prepare annual and 5-year reports on the use of the money and the continued need for it after 5 years had run. In 2020, the developer demanded a refund of fees paid in 2013 and brought this action when the City denied the request. The trial court ruled for the City, finding that the claim was time-barred and because the Mitigation Fee Act does not apply since the fees were voluntary. The Court of Appeal reversed in a lengthy, detailed, and published opinion. The court rejected the City's argument that a fee which a developer voluntarily elects to pay in exchange for being relieved of a statutory requirement is not an AB 1600 fee, and then determined that the statute of

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limitations did not begin to run until the City denied the request for a refund of the unexpended in-lieu parking fees. The court further found that since the Mitigation Fee Act applies, the City was required to issue reports every five years, and that its failure to do so triggered the remedy of refunding all of the unspent funds to the developer. The City sought Supreme Court review, which CSAC supported, but review was denied.

***Howard Jarvis Taxpayers Assn v. Coachella Valley Water District***

Pending in the Fourth Appellate District, Division Two (filed Mar. 2, 2023)(E080870)

Status: Case Fully Briefed and Pending

This case is a Prop. 218 challenge to the rates the Coachella Valley Water District (CVWD) charges those who take raw water from the District's canals for irrigation. CVWD uses canals to transport raw from the Colorado River to serve farmers, golf courses, and others. Because golf courses and other municipal and industrial uses have growing demand for water and farmers' demand is declining (as land is developed for urban uses), CVWD obtained expensive new supplies via the Colorado River Settlement Agreements, and allocates those charges to Class 2 users (mostly golf courses and other irrigators in non-farm settings). CVWD also uses the canal rates to charge the domestic utility for the use of the canal water it uses to recharge groundwater basins from which domestic supplies are drawn. HJTA subbed into the litigation for a domestic utility user to challenge the canal rates, even though the user does not himself pay the rate except to the extent those costs that are charged to the domestic utility are folded into his rate. In wide ranging rulings, the trial court: (1) found plaintiff had standing to challenge the canal rates; (2) held there was no rational basis to reduce rates for legacy agricultural users even though the court did not find any evidence that urban users were paying more than the reasonable cost of service (which is the constitutional standard); (3) determined the proper remedy is to refund the difference between the challenged rates and the last, unchallenged rate, rather than the difference between the rates charged and lawful rates; (4) notwithstanding what it determined was the proper remedy, the court actually ordered refunding the difference between the actual rates and rates that spread canal water costs uniformly across Classes 1 and 2, essentially exercising legislative judgment; and (5) refused to apply Health & Safety Code section 5472's requirement that those seeking refunds first pay utility fees under protest. CSAC filed a brief in support of CVWD. The case is fully briefed and pending.

***In re W.M. (City of Vallejo v. Superior Court)***

Unpublished Opinion of the First Appellate District, 2023 Cal.App.Unpub.LEXIS 1917 (1st Dist. Mar. 29, 2023)(A166116), *request for publication denied* (July 12, 2023)(S279584)

Status: Case Closed

W.M. was shot and killed by City of Vallejo police officers. He was an adult at the time of the shooting. The City discovered that he had been subject to juvenile delinquency proceedings under Welfare and Institutions Code section 600 and sought access to those records, arguing they were relevant to defend plaintiff's loss of enjoyment of life claims and the officers' claims of self-defense. The juvenile court denied the petition, holding that the City is not an entity authorized to review case files. In an unpublished opinion, the First District disagreed, holding instead that the City may be able to access the files if they can show good cause and the court finds the

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need for access outweighs the policy considerations favoring confidentiality of juvenile case files. Here, the juvenile court erred in summarily denying the petition without instead of engaging in this analysis, so the Court of Appeal sent the case back to the juvenile court. CSAC requested that the opinion be published, but the request was denied.

***Kinney v. City of Corona***

99 Cal.App.5th 1 (4th Dist. Div. 2 Dec. 29, 2023)(E079840), *request for publication granted* (Jan. 24, 2024)

Status: Case Closed

Under Civil Code of Procedure section 998, if a defendant in litigation makes a settlement offer to a plaintiff that plaintiff refuses, and the plaintiff does not ultimately obtain a more favorable outcome in the litigation than was provided in the settlement offer, the award of attorneys' fees and costs is generally limited to the fees and costs incurred prior to the 998 settlement offer date. In an opinion that was originally unpublished, the Court of Appeal found for the first time that 998 settlement offers apply in Public Records Act cases. Therefore, the court reduced a trial court award of \$43,300 in fees and costs down to \$2,475, which was the amount of fees and costs incurred at the time the defendant City made a 998 settlement offer that plaintiff rejected. CSAC's request that the opinion be published was granted.

***Legislature of the State of California v. Weber***

Original Writ Petition Pending in the California Supreme Court (filed Sept. 26, 2023)(S281977)

Status: Case Fully Briefed and Pending

The California State Legislature, Governor Newsom and John Burton have filed a pre-election challenge in the California Supreme Court seeking to prevent the Taxpayer Protection and Government Accountability Act ("Act") from appearing on the November 2024 ballot. The Petition asserts that the Act amounts to an unconstitutional revision of government and an unlawful interference with essential governmental powers by: (1) amending the California Constitution to prevent the Legislature from passing any taxes and require that any change in law that imposes or increases a tax for any taxpayer be approved by the voters; (2) enlarging the definition of what is a tax, and requiring that the Legislature and local legislative bodies approve any new or increased fees (as opposed to taxes), thereby subjecting these fees to referendum; (3) limiting these fees to the cost of providing the service for which they are imposed and requiring that, if challenged, the government would have to prove that relationship by clear and convincing evidence; (4) requiring a 2/3 vote for initiative special taxes and imposing new requirements for the ballot materials used to submit taxes to the voters; and (5) stating that the measure applies retroactively to any tax or fee adopted after January 1, 2022 and giving state and local government only one year in which to ask voters to reapprove those taxes. The petition argues that a pre-election challenge is necessary because of the scope of these reforms and because of the short time to reapprove taxes and fees adopted before January 1, 2022 and November 2024 if the measure is adopted. On November 29, the Court issued an order to show cause and set a briefing schedule, though the request for a stay was denied. CSAC has filed a brief in support of petitioners. The case is fully briefed and pending.

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***Make UC a Good Neighbor v. Regents of the University of California***

88 Cal.App.5th 656 (1st Dist. Feb. 24, 2023)(A165451), *petition for review granted* (May 17, 2023)(S279242)

Status: Case Fully Briefed and Pending

This case concerns the adequacy of an EIR for the long range development plan for UC Berkeley and the university's immediate plan to build student housing on the current site of People's Park, a historic landmark and the well-known locus of political activity and protest. The Court of Appeal held: (1) the university was not required to analyze an alternative to the long range development plan that would limit student enrollment; (2) there was no CEQA violation in restricting the geographic scope of the plan to the campus and nearby properties, excluding several more distant properties; (3) the EIR adequately assessed and mitigated environmental impacts related to population growth and displacement of existing residents; (4) the EIR failed to justify the decision not to consider alternative locations to the People's Park project; and (5) the EIR failed to assess potential noise impacts from loud student parties in residential neighborhoods near the campus (a long-standing problem that the court determined the EIR erroneously found to be speculative). The Regents sought California Supreme Court review, which CSAC supported, and review has been granted. CSAC also filed an amicus brief on the merits in this case. The case is fully briefed and pending.

***Murguria v. Langdon (County of Tulare)***

61 F.4th 1096 (9th Mar. 14, 2023)(21-16709), *petition for rehearing denied* (July 18, 2023), *cert. petition denied* (Jan. 8, 2024)(23-270)

Status: Case Closed

Heather Langdon intentionally drowned her 11 month-old twin boys in the bathtub of a motel room. Plaintiffs, the father and older brother of the twins, claim that a city police officer and a county social worker had a duty to protect the twins but failed to do so by not placing Langdon on an involuntary psychiatric hold and/or removing the twins from her custody. The trial court granted the County's motion to dismiss, but the Ninth Circuit reversed in a 2-1. The court concluded that the "state created danger" doctrine applied, and that plaintiffs alleged facts to show that the officer and/or social worker made the twins more vulnerable to harm and acted with deliberate indifference to the risk that Langdon would harm the twins. As to the County social worker, the court found potential liability because the social worker was allegedly aware of mother's history of mental illness and violence, but not tell the officer to remove the minors when the officer phoned her seeking information about the mother, which left the twins more vulnerable to physical injury and amounted to deliberate indifference. The dissent found that the majority opinion improperly expanded the state created danger doctrine in three ways: (1) the majority opinion found a substantive due process violation in the absence of any abusive exercise of state authority; (2) the majority indicates that official may be liable for failing to take affirmative actions to protect children from a dangerous parent, which conflicts with established precedent that failure to protect is not an egregious abuse of state-assigned power; and (3) the majority imposed liability for substantive due process violations when plaintiffs' allegations amounted to mere negligence. CSAC filed a brief supporting the County's request for US Supreme Court review, but review was denied.



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***Ocean S. v. County of Los Angeles***

Pending in the United States District Court, Central District of California (filed Aug. 22, 2023)(Case No. 2:23-cv-06921-JAK-E)

Status: Amicus Brief Due March 5, 2024

This putative class action is brought by seven “transition age foster youth” (ages 16-21) who allege that the State and County defendants are violating federal law and their constitutional rights by failing to provide “meaningful access to the crucial housing, mental health, and other services to which they are legally entitled.” Specifically, the complaint alleges: (1) Defendants violate plaintiffs’ due process rights by “failing to develop a minimally adequate array of safe and stable placements;” (2) Defendants violate the federal Adoption Assistance and Child Welfare Act by failing to develop and implement a system for providing transition age foster youth with legally compliant case plans and transition plans; (3) Plaintiffs’ procedural due process rights are violated by the opaque placement process and inadequate opportunities to be heard; (4) Failure to provide a minimally adequate array of safe and stable placements appropriate for expecting and parenting youth violates their First and Fourteenth Amendment rights to freedom of familial association; and (5) Defendants violate the ADA and Rehabilitation Act by denying access to placements to transition age foster youth with disabilities. CSAC will file a brief in support of LA County’s motion to dismiss.

***Olympic and Georgia Partners v. County of Los Angeles***

90 Cal.App.5th 100 (2d Dist. Apr. 7, 2023)(B312862), *petition for review granted* (July 12, 2023)(S280000)

Status: Fully Briefed and Pending

This case involves property taxation of hotels, and in particular, the 1,001 room Ritz-Carlton and Marriott luxury hotels at the LA Live entertainment district in downtown Los Angeles. For these properties, the City of Los Angeles needed a convention hotel to lodge visitors to its very nearby Convention Center, and therefore it agreed to rebate its 14% hotel tax to the hotel developer in exchange for the developer's agreement to set aside big a part (up to 75%) of the rooms for Convention Center visitors and keep the property a hotel for 40 years. In essence, the hotel provides lower rates to convention groups and forgoes turning the property into condos, which would be more economically valuable to the property owner. The value of the rebate is about \$1 million per year for each hotel for a total of about \$80 million over the 40 year deal. In assessing the property, the Los Angeles County Assessor treated those rebated taxes as income from the operation of the hotels. This valuation was upheld by the AAB and the superior court. However, the Second District disagreed, holding: (1) the payments were a "subsidy;" and (2) government subsidies cannot be included as income from use of real estate. The court also addressed a one time \$36 million payment the hotel owner received from the hotel operators (Ritz Carlton and Marriott) in exchange for a percentage of the profits, which is known as “key money.” The Assessor treated this key money as income from the real estate, which was upheld by the AAB and the superior court. Again, the Court of Appeal reversed and directed that the key money be excluded from the property assessment. The Supreme Court has granted LA County’s petition for review. CSAC filed a brief in support.

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***Roberts v. Coachella Valley Water District***

Pending in the Fourth Appellate District, Division Two (filed Aug. 21, 2023)(E081996)  
Status: Amicus Brief Due July 8, 2024

This case involves replenishment assessment charges (RACs) that the Coachella Valley Water District (CVWD) imposes on those who pump groundwater. It charges its RACs to its own domestic water operation to reflect groundwater used in that service, and charges different rates to ground water pumpers based on which of two regions/subbasins they are in, as one of the regions requires greater transportation of water to replenish the groundwater than others, creating more expensive replenishment. HJTA sued for a class of domestic customers challenging these rates, even though no domestic customer directly pays the rate. The trial court concluded the Coachella Basin cannot be divided in subbasins (as the USGS and other scientific sources have done for years) and that CVWD was obliged to recover its costs from all three areas of benefit equally. It therefore concluded CVWD violated Prop. 26. It imposed a refund remedy of the difference between rates actually paid and what a uniform rate would have been, across all basins and for the three years in issue. Further, it ordered these tens of millions in refunds without requiring Health and Safety Code, section 5472 compliance (i.e., payment under protest) or even a Government Claims Act claim as to one year and issued a writ requiring CVWD to comply with Prop. 26 in the future, risking a contempt proceeding (rather than a new lawsuit) if plaintiffs disagree with future rates. CSAC will file a brief in support of CVWD on appeal.

***San Bernardino County Board of Supervisors v. Monell***

91 Cal.App.5th 1248 (4th Dist. Div. 2 May 25, 2023)(E077772), *petition for rehearing denied* (July 16, 2023), *petition for review denied* (Aug. 16, 2023)(S280838)  
Status: Case Closed

At the November 2020 election, the voters in San Bernardino County adopted Measure K, which amended the County Charter in two ways: (1) it limited compensation for members of the Board of Supervisors to \$5,000 per month, which includes the actual costs to the County for all benefits, namely salary, allowances, credit cards, health insurance, life insurance, leave, retirement, membership, portable communications devices, and vehicle licenses; and (2) imposed a one-term limit for members of the Board. The Board challenged the measure on several grounds. On the compensation piece, the Board argued that the matter of Board salaries is exclusively delegated to the Board and cannot be set by initiative. As to the one term limit, the Board argued that while term limits generally are permissible, the short duration of this term limit violated the First and Fourteenth Amendments by creating an unreasonable burden on the voters' right to vote and an incumbent's right to seek office. Specifically, the Board argued that the initiative is an unconstitutionally severe restriction on the right of the electorate to vote for the candidate of their choice and the right of an incumbent to run for office again.

The trial court agreed with the Board that the one term limit is unconstitutional. Applying a strict scrutiny analysis, the one term limit failed since less restrictive means were available to achieve the initiative's objectives without precluding the candidate from ever being able to seek re-election and never allowing a voter to re-elect a candidate they believe is performing competently. As to the salary limit, however, the court concluded that the constitution "gives the right of amending charters by the initiative power thereby indicating the initiative process may also

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amend the compensation provisions within a charter.” Nevertheless, the trial court granted the Board’s writ petition and concluded the initiative could not be implemented because the salary provision could not be severed from the unconstitutional term limit provision. Though there is a severability provision in the measure and the court found the two provisions are grammatically and functionally severable, it held that the initiative proponents failed to show that the two provisions are volitionally severable (i.e., that voters would have voted for the salary cap if they knew that the term limit would be invalid).

After concluding that the trial court order is appealable and the case was not rendered moot by a subsequently adopted initiative that has superseded Measure K (currently subject to legal challenge in the Court of Appeal), the court went on to uphold a one-term term limit. The court compared the one-term limit to the limits imposed on the State Assembly and Senate and concluded that “difference between the six or eight years there and the four years here is not sufficient to be constitutionally significant — particularly when the term limits here are similarly neutral and nondiscriminatory and do not preclude an incumbent from holding any other office. Four years is ample time for a supervisor to at least attempt to tick off all the boxes on his or her legislative to-do list. In this respect, the Board, with only five members, is very different from the California Senate, with 40 members, or the California Assembly, with 80 members. In the latter bodies, seniority and a cursus honorum of committee memberships both play a role. By contrast, a newly elected supervisor can hit the ground running. The Board does not point to anything that a supervisor could accomplish in six or eight years but not in four.” The court also found that limiting a Supervisor to one term does not unduly infringe on the rights of the voter or the office holder.

The court also upheld the compensation limit, agreeing with the trial court that there is “no clear indication that the Legislature intended the governing body to exclusively hold the right to set their salary within the charter and exclude the use of the initiative power to amend the charter associated with the governing body’s compensation.” The court concluded that while Boards in general law counties may have exclusive rights to set Board compensation, in charter counties the constitution leaves that up to the charter, which can be amended by the voters. The court further found that because this case is a facial challenge, arguments that the salary “may” violate minimum wage laws were not sufficient to invalidate the measure. Justice Menetrez dissented, concluding that the subsequently adopted ballot initiative that superseded Measure K rendered nearly every issue in the case moot. Litigation challenging that ballot measure (Measure D) is currently pending in the Court of Appeal following a trial court ruling in the County’s favor. The San Bernardino County Board of Supervisors is sought California Supreme Court review, which CSAC supported, but review was denied. CSAC also sought depublication of the Court of Appeal’s opinion, but that request was similarly denied.

***Santa Paula Animal Rescue Center v. County of Los Angeles***

95 Cal.App.5th 630 (2d Dist. Sept. 18, 2023)(B318954), *petition for rehearing denied* (Oct. 16, 2023), *petition for review denied* (Dec. 13, 2023)(S282524)

Status: Case Closed

In this case, plaintiff alleged that “Food and Agriculture Code section 31108 and similar provisions [the Hayden Act] impose on the County a ministerial duty to: (1) release a dog or other shelter animal to a requesting animal adoption or rescue

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organization with Internal Revenue Code section 501(c)(3) status prior to euthanasia without first determining whether the animal has behavioral problems or is adoptable or treatable, and (2) release the aforementioned animal to the requesting animal rescue or adoption organization without requiring the organization to meet qualifications additional to having Internal Revenue Code section 501(c)(3) status.” The trial court found in favor of the County, but the Court of Appeal reversed and remanded: “We conclude that the demurrer was improperly granted, because the County lacks discretion to withhold and euthanize a dog based upon its determination that the animal has a behavioral problem or is not adoptable or treatable. However, the County has discretion to determine whether and how a non-profit organization qualifies as an animal adoption or rescue organization.” CSAC supported the County’s request for Supreme Court review, but the request was denied.

***Sheetz v. County of El Dorado***

84 Cal.App.5th 394 (3d Dist. Oct. 19, 2022)(C093682), *petition for review denied* (Feb. 1, 2023)(S277509), *cert. petition granted* (Sept. 29, 2023)(22-1074)

Status: Case Fully Briefed and Pending

El Dorado County has a traffic impact mitigation (TIM) fee program to finance the construction of new roads and the widening of existing roads. Under the program, the County imposes a TIM fee as a condition to the approval of a building permit to mitigate the traffic impacts on state and local roads from new development. Consistent with California’s Mitigation Fee Act, the fee is based on the project type and location and is intended to cover the cost of constructing new roads and widening existing roads without regard to the cost specifically attributable to the particular project on which the fee is imposed. Plaintiff challenged the \$23,420 TIM fee he was charged to build a 1,854-square-foot single-family manufactured home on his property, alleging it violated the States Mitigation Fee Act and that it amounted to an unconstitutional regulatory takings under US Supreme Court precedent known as the Nollan-Dolan doctrine, which requires a nexus and rough proportionality between a project and any impact fees.

Both the trial court and Court of Appeal upheld the County’s TIM fee. The appellate court noted that the Nollan-Dolan doctrine does “not extend to development fees that are generally applicable to a broad class of property owners through legislative action.” The court distinguished legislative exactions (like the TIM fee is this case) from those fees that are done on an individual or ad hoc basis (and are therefore subject to the Nollan-Dolan doctrine). Because the TIM fee is a legislatively prescribed development fee that is generally applicable to a broad class of property owners, plaintiff failed to state a regulatory takings claim. The court also found the County met the “reasonable relationship” test under the Mitigation Fee Act and the County was not required to evaluate the specific traffic impacts attributable to Plaintiff’s particular project before imposing the fee.

The United States Supreme Court has granted review to consider whether a permit exaction is exempt from the unconstitutional conditions doctrine as applied in Nollan and Dolan because it is authorized by legislation. CSAC has filed a brief in support of the County.

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***Siskiyou Hospital v. County of Siskiyou***

Pending in the Third Appellate District (filed Apr. 4, 2023)(C098311)

Status: Amicus Brief Due Apr. 11, 2024

This lawsuit represents an attempt by a local hospital – Fairchild Medical Center – to broadly change the way the County and DHCS handle patients who are taken to the Medical Center under Welfare & Institution Code (W&I) section 5150. The complaint alleged that both the County and the State fail to provide timely, medically necessary mental health services for Siskiyou County citizens who are placed on a 5150 emergency hold, fail to pay for services rendered by the Medical Center to those patients under W&I 17000, and fail to comply with the LPS Act. Specifically, the Medical Center argues that the County must remove 5150 patients from the hospital emergency department immediately upon completion of a medical clearance. It further alleges that a patient must be removed from the hospital whether a bed in a mental health facility is available at the time or not. Alternatively, if the patient is not removed, the Medical Center argues that the County must compensate it for any services that may be given a patient prior to his or her placement or release at a rate other than that which the Medical Center normally receives for caring for a mental health patient.

The trial court denied the Medical Center’s request for a preliminary injunction and dismissed the action. As to the heart of the financial dispute under W&I 17000, the Medical Center acknowledged that it has an obligation under the Emergency Medical Treatment and Labor Act ("EMTALA") to provide emergency medical care to 5150 patients but argued that its obligation is completed once the patient has stabilized. The trial court disagreed. The court first found that the obligation stays with the Medical Center until the patient is no longer a danger to himself or others, which is a determination made the County, and the court would not order the County to exercise its discretion in making that determination in any particular manner. The court also held that the County does not have an obligation to reimburse for costs incurred after a patient is medically cleared, concluding that the Medical Center’s “obligation to provide continued services until the patient is stable or transferred obviates Respondent's obligations under W&IC § 17000. . . . [The] County’s § 17000 obligation does not arise until that assessment of danger [to self or others] is completed by County and the patient is either released to transferred to another facility. Further, despite [the County’s] § 17000 obligations, it is not required to pay claims for services rendered unless authorized by law and cannot be required under a quasi-contractual theory of law.” Finally, the court concluded that it does not violate the LPS Act to have patients on a 5150 hold at the Medical Center. The Center does not need to be a DHCS designated treatment facility for purposes of performing critical functions required under § 5150 because it is not providing mental health services to patients. CSAC will file a brief in support of the County on appeal.

***Stone v. Alameda Health System***

88 Cal.App.5th 84 (1st Dist. Feb. 3, 2023)(A164021), *petition for review granted* (May 17, 2023)(S279137)

Status: Fully Briefed and Pending

Plaintiffs are employees of the Alameda Health System, a public hospital authority created by the County of Alameda under Health and Safety Code section 101850. As relevant to this amicus request, plaintiffs alleged class action claims related to alleged wage and hour violations. The trial court ruled in favor of the health

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system, concluding that it is a “statutorily created public agency” beyond the reach of the Labor Code sections and Industrial Welfare Commission (IWC) Wage Orders invoked in the complaint. The Court of Appeal reversed. The court applied the “sovereign powers doctrine” to conclude that application of the state’s wage and hours laws and IWC Wage Orders to the health system would not infringe on any sovereign powers. The court also found that the health system is not a “municipal corporation” for purposes of the municipal corporation exemptions from the Labor Code because it lacks essential municipal functions (power of eminent domain, elected board, ability to impose taxes, independent regulatory or police powers). However, the court did find that where the Labor Code provides an exception for public agencies, including “other governmental entities,” the health system qualifies for that exemption because that is an expansive term that encompasses the health system. The health system sought Supreme Court review, which CSAC supported, and review has been granted. CSAC has also filed an amicus brief on the merits in support of the health system.

***Stronghold Engineering v City of Monterey***

96 Cal.App.5th 1203 (6th Dist. Nov. 3, 2023)(H050157), *petition for review denied* (Feb. 14, 2024)(S283051)

Status: Case Closed

Monterey has a complex dispute with the contractor that rebuilt its Convention Center. Early in the life of the project, the parties negotiated a change order to grant the contractor substantially more time in exchange for its waiver of any delay damages for the life of the project. The contractor regretted its bargain and filed more than 100 changes orders, all alleging delay damages. Without filing a Government Claims Act claim, it filed this action seeking a declaration that the City owed “compensation” for delays. Over years of litigation, the contractor did file three successive Government Claims Act claims with the City and amended its complaint to allege delay damages. The trial court ruled in favor, but the Court of Appeal reversed, finding that the claims requirement does not apply to an action seeking purely declaratory relief. The City plans to seek Supreme Court review to ask the Court to find that the Claims Act applies to lawsuits styled as a declaratory relief action designed to address “compensation” issues. CSAC supported the City’s petition for California Supreme Court review, but review was denied.

***Valenti v. City of San Diego***

94 Cal.App.5th 218 (4th Dist. Div. 1 July 18, 2023)(D080133), *request for publication granted* (Aug. 8, 2023)

Status: Case Closed

Plaintiff submitted two requests for public records using the City’s online records web portal. The City responded to the first request by providing responsive records, and to the second by providing responsive records and indicating it would continue to provide records on a rolling basis except for those exempt from disclosure. Two months after submitting the second PRA request, but before the City had closed out the request on its “NextRequest” document management system, plaintiff filed this action seeking an order directing the City to comply with the PRA with respect to his requests. During the course of litigation, in response to discovery requests, the City provided additional records, some redacted. Ultimately the trial court held a bench trial and ruled in favor of the City on the PRA claims, concluding the City’s redactions and withholdings were proper. Plaintiff then sought attorney’s fees and

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costs as a prevailing party under Government Code section 7923.115 (formerly 6259). He argued that although he had not obtained a judgment against the City, his lawsuit had caused the City to produce two categories of records it would not otherwise have produced in response to his original requests making him a prevailing party entitled to an award of attorney fees. The trial court denied his request. The Court of Appeal affirmed in an unpublished opinion. The court rejected plaintiff's argument that but for the lawsuit, the records he received in response to his discovery request would not have been produced. The court noted that rather than work to clarify or narrow his first PRA request, plaintiff filed a second broader request, and then he filed this litigation before the City had finalized its response to the second request. Under these facts, plaintiff could not meet his burden of establishing causation between his lawsuit and the production of records. CSAC's request that the opinion be published was granted.

***Yes in My Backyard v. City of Culver City***

Pending in the Second Appellate District (filed July 8, 2022)(B321477)

Status: Case Closed

This case involves interpretation of Government Code Section 66300(b)(1)(A) (commonly referred to as "SB 330"), which prohibits a city or county from:

Changing the general plan land use designation, specific plan land use designation, or zoning of a parcel or parcels of property to a less intensive use or reducing the intensity of land use within an existing general plan land use designation, specific plan land use designation, or zoning district in effect at the time of the proposed change, below what was allowed under the land use designation or zoning ordinances of the affected county or affected city, as applicable, as in effect on January 1, 2018, except as otherwise provided in clause (ii) of subparagraph (B) or subdivision (i). For purposes of this subparagraph, "reducing the intensity of land use" includes, but is not limited to, reductions to height, density, or floor area ratio, new or increased open space or lot size requirements, new or increased setback requirements, minimum frontage requirements, or maximum lot coverage limitations, or any other action that would individually or cumulatively reduce the site's residential development capacity.

The Los Angeles County Superior Court interpreted this language very broadly to preclude Culver City from regulating the size of large, single-family homes. The court found that "reducing the intensity of land use" includes reducing the size of single-family homes and struck down Culver City's limits on the Floor Area Ratio of single-family homes.

The Court of Appeal affirmed. The court first found that the City violated the SB 330's plain language by reducing the intensity of land use in the R-1 zone to below what was allowed under the City's zoning ordinance that was in effect on January 1, 2018. The court also found that even if it considered legislative intent, it found that the plain language is consistent with the legislative purpose of SB 330. "The Legislature confirmed the Act's intent to broadly prohibit any local policies that lessen housing intensity when it enacted the 2022 amendments. In discussing the prohibition on reducing the intensity of land use and zoning ordinance amendments,



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the Legislature recognized that an affected city had to ‘ensure that there is no net loss in [residential capacity] ital’. . . . The legislative history shows an intent to ensure that local governments do not enact policies that delay housing development or reduce a lot’s residential capacity.” CSAC submitted an amicus brief in support of the City, but the Court of Appeal did not allow any amicus briefs in this case.



# Course Guide Winter-Spring 2024

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# January

## 351 Reinvigorating Team Performance: Strategies for Alignment

Friday, January 5<sup>th</sup> / 10am-4pm {Riverside}

This class aims to provide knowledge and practical skills to evaluate and align new and established teams. Participants will learn about the stages and cycles of a team, assess areas of disconnect and misalignment, and acquire techniques and strategies to help teams move toward a more aligned and cohesive space. The objective of the class is to have participants leave with a new perspective on dynamics within organizational groups, practical techniques to develop strategies for realignment, and tools to help establish or reset intentions to improve focus and collaboration within a team.

### INSTRUCTOR:

Xochitl Morales is a General Manager with CommonWealth Partners. Two of her teams have received a TOBY Award (The Outstanding Building of the Year) from the Building Owners and Managers Association. In addition to property operations, Xochitl provides customer service and work order system training, and operations product development.

## 110 Leadership Fundamentals and Public Service Values

Thursday, January 11<sup>th</sup> / 10am-4pm {Humboldt}

This course is designed exclusively for staff who have recently transitioned from manager to director. This course will focus on the differing roles and competencies as leaders, how to best transition, change management, how to build interpersonal relationships, and developing effective communication skills.

### INSTRUCTOR:

Paul Danczyk, PhD is the Chief Operating Officer of the California Counties Foundation.

## 131 Leading for Diversity, Equity, and Inclusion (DEI) in County Government

Thursday, January 11<sup>th</sup> / 10am-4pm {Monterey}

This course focuses on changing policy and practices in county government through an equity, diversity, and inclusion lens. The course explores a systemic framework developed around structural changes to address complex issues of inequities that impact communities across counties. Participants will have the opportunity to engage in self-reflection, content exploration, and learn how to apply research based best practices to address internal and external inequities across the county. Topics include:

- The impact of historical politics and public education on underserved or vulnerable communities
- Key terms related to DEI (diversity, equity, inclusion, implicit bias, stereotypes, oppression, institutional racism)
- Cultural Proficiency Framework

### INSTRUCTOR:

Nicole Anderson is the founder and CEO of Nicole Anderson and Associates Consulting, LLC. Nicole has served as a developer and facilitator of professional learning services as well as an advocate for educational equity work in numerous ways around the nation.

## 112 Empathic Stance in Leadership Roles

Friday, January 12<sup>th</sup> / 10am-4pm {Humboldt}

The importance of empathy in leadership cannot be overstated. Leaders hear this all the time “Be encouraging, a good listener, and show genuine interest in your team.” This course will demonstrate the impact of engaging empathy to create a culture of trust and maximize your team’s ability to approach leadership and communication from a place of empathy rather than judgment. Whether empathy comes naturally to you or if it is a skill you are working on, this course welcomes county leaders to flex their empathy might for the collective wellness of the team.

### INSTRUCTOR:

Paul Danczyk, PhD is the Chief Operating Officer of the California Counties Foundation.



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## 110 Leadership Fundamentals and Public Service Values

Friday, January 19<sup>th</sup> / 10am-4pm {Fresno}

This course is designed exclusively for staff who have recently transitioned from manager to director. This course will focus on the differing roles and competencies as leaders, how to best transition, change management, how to build interpersonal relationships and developing effective communication skills.

### INSTRUCTOR:

Paul Danczyk, PhD is the Chief Operating Officer of the California Counties Foundation.

## 123 Strategic Planning: Crafting and Leading Planning Processes

Thursday, January 25<sup>th</sup> / 9am-1:30pm {Virtual}

Thinking strategically and determining priorities are essential skills in organizations, especially during times of uncertainty. This course examines how to make a strategic plan for a living document and have it mean something to those affected. Participants examine:

- Developing a methodology for thinking strategically using the “STEP” model
- Crafting strategic goals and plans (including with the Board of Supervisors or other governing board), including
  - during times of uncertainty
  - Engaging stakeholders in the process
  - Determining priorities and desired outcomes
- Tips to prepare an actionable plan.

Best practices and case examples are explored to support integration of the plan into agency operations and decision making. Discussion highlights tips for supporting strategic thinking during times of change and uncertainty.

### INSTRUCTOR:

Angela Antenore, MEd is an experienced strategic facilitator, coach, and university instructor.

## 110 Leadership Fundamentals and Public Service Values

Thursday, January 25<sup>th</sup> / 10am-4pm {Inyo}

This course is designed exclusively for staff who have recently transitioned from manager to director. This course will focus on the differing roles and competencies as leaders, how to best transition, change management, how to build interpersonal relationships and developing effective communication skills.

### INSTRUCTOR:

Paul Danczyk, PhD is the Chief Operating Officer of the California Counties Foundation.

## 156 Government 101

Friday, January 26<sup>th</sup> / 9am-1:30pm {Virtual}

This course will provide an overview of the history and context of counties in California and will discuss the relationship between counties and the state and federal government. The course will also share information about county services, departments, and responsibilities, the role of the Board of Supervisors, the role of policymakers and administrators, and how county employees receive authority and direction.

### INSTRUCTOR:

Dallin Kimble is the County Administrative Officer for Mariposa County.



# February

## 372 Executive Leadership

Friday, February 2<sup>nd</sup> / 10am-4pm {Riverside}

In an earlier course, distinctions were made between “management” and “leadership.” This course takes the conversation to the next level, recognizing the art of leadership within the executive roles could look and feel different from applying leadership in other settings. This course explores themes of authenticity, emotional intelligence, humility, and confidence while building ecosystems of support and empowerment. It draws a distinction between mindset and organizational culture to facilitate actionable approaches.

### INSTRUCTOR:

Carol Geffner, Ph.D., was previously the Professor of the Practice of Governance, Management and Policy at the University of Southern California’s Sol Price School of Public Policy and Director of the Executive Master of Leadership Program. She currently is the President of CB Vision Consultants, LLC, a national management consulting and executive coaching firm.

## 347 IT: Lead Business Innovation

Thursday, February 8<sup>th</sup> / 9am-2:30pm {Virtual}

While in the private sector corporations look to innovate with disruptive technologies to drive top-line growth, governments look to leverage innovation to reduce current service costs, improve services, or introduce new ones. The good news is when IT departments have a holistic view into their organization, they can credibly establish themselves as innovative visionaries and strategic partners of other departments. The bad news is that many IT departments lack this view and are not considered innovative. This course is designed to help government IT leaders reverse this trend. By learning how to gain and manage awareness of the organization’s strategies and priorities, obtain stakeholder commitment, and become strategic partners, IT can avoid being seen as a “black box” and instead earn recognition as organizational innovators.

### INSTRUCTOR:

Carolyn Staats, Director of Innovation, IT Department of Sonoma County.

## 396 State Budget 101: What Counties Need to Know

Thursday, February 8<sup>th</sup> / 10am-4pm {Monterey}

Did you ever wonder how the Governor made that budget decision or why it changed it in May? Or do you want to find out how the Legislature changes the Governor’s proposal or how counties can influence either the Governor or the Legislature? This is the class where you can learn the budget basics and answers to those questions and so much more. Learn about who influences – and how they do it – the state budget process, policy and politics. It’s an inside look at a complex process which influences virtually every aspect of county operations. Learn about how to find and interpret budget information and a few tips about influencing budget decisions.

### INSTRUCTOR:

Diane Cummins, former Special Advisor to Governor Brown for state and local finances and has worked in both the executive and legislative branches on the budget and a CSAC Legislative Representative in the area of Human Services.

## 140 Strategic Leadership: Boosting Productivity and Motivation

Thursday, February 15<sup>th</sup> / 10am-4pm {Humboldt}

This course is designed to elevate strategic leadership skills by enhancing productivity and motivation for yourself and your teams. Participants will explore proven techniques and frameworks to drive organizational success through effective leadership. Course Objectives:

### 1. Strategic Goal Alignment:

Equip leaders with the skills to align team objectives with overarching organizational goals, fostering a unified and purpose-driven approach to tasks. Participants will learn to develop and communicate a compelling vision that motivates and guides their teams toward strategic milestones.

## 2. Performance Optimization Strategies:

Delve into methodologies for optimizing individual and team performance. This objective focuses on identifying key performance indicators, implementing performance feedback mechanisms, and fostering a culture of continuous improvement to maximize productivity.

## 3. Motivational Leadership Techniques:

Explore various motivational leadership styles and techniques tailored to different organizational contexts. Leaders will learn to inspire and engage their teams by understanding individual motivations, fostering a positive work environment, and utilizing effective communication strategies.

## 4. Resilience and Stress Management:

Equip leaders with tools to navigate challenges, build resilience, and manage stress effectively. This objective addresses the importance of maintaining a healthy work-life balance, promoting mental well-being, and cultivating a resilient mindset to sustain high levels of productivity in dynamic business environments.

### INSTRUCTOR:

Regina Romeo is a former Chief Human Resources Officer and Chief Diversity Officer. She currently owns and operates her own consulting firm and provides HR consulting, DEI consulting, and expert witness services.

## 141 Managing Yourself to Lead Others

Friday, February 16<sup>th</sup> / 10am-4pm {Fresno}

As leaders, it's well documented that when it comes to tending our people and our organizations, we are willing to undertake almost every strategy or practice save for the one most essential: tending to our own resilience and wellbeing. Why does it matter? Because you are the "secret sauce" when it comes to the success of individual and organizational performance, YOU MATTER. Your leadership presence is the foundation for performance. What is that you may ask: "...the ability to connect authentically with the thoughts and feeling of others in order to motivate and inspire them to achieve a desired result." \*And that focused attention is dependent upon your ability to show up open, present, connected, and healthy yourself. We will explore: what it means to be a resilient leader and how that relates to team and organizational resilience, the role mindfulness plays in that presence and the link to stress, a variety of practices that support resilience for you to model and share with your team; and develop a personal resilience plan to support you in showing up at your best to support the performance of your team members and the organizational mission.

### INSTRUCTOR:

Michelle Schmitt has 29 years of experience in California State Government service specializing in organizational capacity building, leadership development, succession planning, workforce management and successful new program development & implementation collaborating across diverse stakeholder groups.

## 125 Mastering the Art of Effective Communication

Friday, February 16<sup>th</sup> / 10am-4pm {Humboldt}

This course is tailored for leaders aiming to sharpen their communication skills to achieve success in their professional

endeavors. Participants will engage in practical exercises and insightful discussions to refine their communication techniques and navigate a variety of business scenarios. Course Objectives:

### 1. Strategic Communication Proficiency:

Develop a strategic communication toolkit that enables leaders to convey complex ideas with clarity, align communication with organizational objectives, and adeptly articulate a compelling vision.

### 2. Effective Stakeholder Engagement:

Explore strategies for building and maintaining strong relationships with key stakeholders, both internal and external. Leaders will learn to tailor their communication styles to different audiences, cultivate trust, and navigate challenging conversations.

### 3. Crisis Communication Mastery:

Equip leaders with the skills to navigate high-pressure situations through effective crisis communication. This objective focuses on developing crisis communication plans, managing public relations, and ensuring transparent and timely communication.

### 4. Inclusive Leadership Communication:

Foster an understanding of inclusive communication practices, enabling leaders to create a workplace culture that values diversity and inclusion. Participants will learn to communicate inclusively, navigate cultural nuances, and promote a collaborative environment.

**INSTRUCTOR:**

Regina Romeo is a former Chief Human Resources Officer and Chief Diversity Officer. She currently owns and operates her own consulting firm and provides HR consulting, DEI consulting, and expert witness services.

**128 Emotional Intelligence**

**Wednesday, February 21<sup>st</sup> / 10am-4pm {Inyo}**

What characteristics and practices distinguish great from good performers? What evidence-based practices should be part of your daily routine to be a high performer? We will answer these questions from a 30-year database and research of top performance as we dive into the four areas of Emotional Intelligence (EI):

1) Understanding Yourself, 2) Managing yourself, 3) Understanding Others and 4) Managing Others. You will take an assessment to determine your EI strengths. Hands on tools to enhance your EI will be explored. Emotional Intelligence is a prime factor to one's success when compared to Intelligence Quotient (IQ) and technical expertise. Business simulations, practice sessions, videos and group discussions will help participants enjoy, engage, and learn more.

**INSTRUCTOR:**

Lucy Hernandez is a certified community action professional and a National R.O.M.A. Certified Trainer.

**110 Leadership Fundamentals and Public Service Values**

**Thursday, February 22<sup>nd</sup> / 10am-4pm {Mariposa}**

This course is designed exclusively for team members who have recently transitioned into a management or director role. This course will focus on:

- Differing roles and competencies as the manager,
- Transitioning from line staff to manager,
- Change management,
- Building interpersonal relationships, and
- Effective communication skills.

**INSTRUCTOR:** Paul Danczyk, Ph.D. is the Chief Operating Officer of the California Counties Foundation

# March .....

**131 Strategic Action: Staying on Top of DEI Goals**

**Friday, March 1<sup>st</sup> / 10am-4pm {Riverside}**

In 2020, organizations hired Chief Diversity Officers and other DEI-focused roles in unprecedented numbers. By the end of 2022, the attrition rate for these roles outpaced non-DEI roles by 50%. Many organizations are laying off DEI personnel in record numbers in the interest of "cost cutting" resulting in a lack of progress toward goals and objectives to achieve diversity in the workplace. This session will look at the rapid evolution of the DEI journey over the last three years and explore how to help your organization keep DEI in the forefront. It will also examine best practices in DEI and what organizations are doing to sustain their commitment to diversity.

**INSTRUCTOR:**

Regina Romeo is a former Chief Human Resources Officer and Chief Diversity Officer. She currently owns and operates her own consulting firm and provides HR consulting, DEI consulting, and expert witness services.

**158 Personal Leadership and Team Dynamics for County Administrators**

**Thursday, March 7<sup>th</sup> / 9am-1:30pm {Virtual}**

Did you know that leaders account for 70% of the variance of their team's engagement (Gallup), and almost 60% of leaders never receive training the first time they get promoted (Center for Creative Leadership)? This workshop will help us understand ourselves better so we can lead our teams effectively to push our organizations' mission forward. Topics covered include personal leadership, executive burnout, team dynamics, and leading a multigenerational team.

**INSTRUCTOR:**

Dr. Santor Nishizaki is a former city manager, TEDx speaker, and the founder and CEO of Mulholland Consulting Group.



### **396 State Budget 101: What Counties Need to Know**

**Thursday, March 7th / 10am-4pm {Mariposa}**

Did you ever wonder how the Governor made that budget decision or why it changed it in May? Or do you want to find out how the Legislature changes the Governor's proposal or how counties can influence either the Governor or the Legislature? This is the class where you can learn the budget basics and answers to those questions and so much more. Learn about who influences – and how they do it – the state budget process, policy, and politics. It's an inside look at a complex process which influences virtually every aspect of county operations. Learn about how to find and interpret budget information and a few tips about influencing budget decisions.

**INSTRUCTOR:** Diane Cummins former Special Advisor to Governor Brown for state and local finances and has worked in both the executive and legislative branches on the budget and a CSAC Legislative Representative in the area of Human Services.

### **356 Communicating and Presenting Complex Issues and Data**

**Thursday, March 14th / 10am-4pm {Humboldt}**

Counties present complex and detailed information to decision makers and the public may fall into the trap of overwhelming the audience with too much content or complexity. This course provides strategies and techniques for presenting data, complex issues, and analytical information in a way an audience can understand and apply. Participants explore balancing content with clarity, effective use of tools such as PowerPoint, and determining what evidence to present. Using their own examples, participants examine how to present statistical data, key elements of visual design, and creation of presentations which communicate multifaceted ideas in a clear manner.

**INSTRUCTOR:**

Deb Hunt, Ph.D. is the Chief Deputy Director for CSU-Sacramento's College of Continuing Education.

### **130 Navigating Difficult Conversations**

**Friday, March 15th / 10am-4pm {Humboldt}**

The ability to handle difficult conversations and behavior tactfully and professionally is an important skill for success in any workplace. This course will focus on how to apply effective techniques that will help produce results. Participants will learn how to use a proactive and straightforward communication approach to deal with a variety of awkward, challenging, and difficult situations. Successful engagement in difficult conversations aims to reduce frustration, anxiety, and avoidance tendencies to enable stronger, more authentic relationships.

**INSTRUCTOR:**

Deb Hunt, Ph.D. is the Chief Deputy Director for CSU-Sacramento's College of Continuing Education.

### **115 Adaptive Leadership**

**Friday, March 15th / 10am-4pm {Fresno}**

Adaptive leadership is a practical approach to solving business issues throughout organizations. The process guides leaders at all levels on how to identify and focus on what's important when facing changes or challenges in their business environment. The Adaptive Leadership theory was introduced by Harvard professors Marty Linsky and Ronald Heifetz, with the belief that businesses are constantly changing and adapting to these changes involves diagnosing, interrupting, and innovating as a means of creating capabilities that align with the aspirations of an organization. The model allows leaders to go beyond simply addressing issues by finding creative ways to solve them utilizing the skills and talents of all employees throughout all levels of an organization. This course is a combination of pre-work, live content delivery, and workshops.

**INSTRUCTOR:**

BJ Snowden is the Dean of the West Sacramento Center at the Sacramento City College, and is part of the 2021 Board of Directors at the American Leadership Forum.

## 126 Engaging Employees for Success

Thursday, March 21<sup>st</sup> / 10am-4pm {Monterey}

In times of disruptive change and scarce resources, it is critical that employees from all levels of the organization are fully productive and engaged in adapting to change and addressing new challenges. This interactive workshop discusses the business case for employee engagement, the conditions fostering active engagement, and simple steps for supervisors, managers, and co-workers to promote engagement.

### INSTRUCTOR:

Dr. Frank Benest is a former city manager of Palo Alto and a noted expert in organizational leadership.

## 363 Thinking and Acting Strategically in Conditions of Uncertainty

Thursday, March 21st / 10am-4pm {Mariposa}

This seminar discusses key features for thinking and acting strategically: staff, external environmental and existing policy. The interactive exercises and discussions identify the challenges of managing in uncertainty. The course includes suggestions for best practices for leading in uncertainty as well as for developing agility to address current and enduring problems counties face. The session facilitates participants' focus on current county challenges. The seminar helps participants create new possibilities and leverage assets for problem solving. Participants apply concepts of creative and strategic thinking to find different paths to solutions. The conversations provide approaches to question assumptions; identify the environmental issues; distinguish strategies from tactics; use team resources, and structure learning from experience.

### INSTRUCTOR:

Dr. Rich Callahan is associate professor of management at the University of San Francisco.

## 132 Leadership Styles

Wednesday, March 27th / 10am-4pm {Inyo}

During this interactive session, we will delve into this question seeking to understand how you can effectively lead in a way that honors your own personality style while also accommodating the styles of those you are leading.

Participants will complete a personality styles inventory and engage in activities and discussions to discover how personality traits can shape leadership style, influence your individual leadership effectiveness, and impact your team's success. The goal of this session is for participants to be able to walk away with a better understanding of themselves, equipped with practical insights and tools they can immediately put into practice.

Together we will:

1. Explore Four Key Dimensions of Personality: Gain insights into these dimensions and how they "show up" in leadership roles.
2. Identify Your Preferred Style: Discover your primary personality style and understand how it affects your leadership approach, decision-making, and communication.
3. Enhance Communication Skills: Learn strategies to communicate effectively with individuals of different personality styles, which can foster better collaboration and teamwork.
4. Adapt and Inspire: Explore techniques to adapt your leadership style to various situations and personalities, becoming a more versatile and influential leader.
5. Case Studies and Group Activities: Engage in real-world case studies and group activities to begin applying new knowledge.

### INSTRUCTOR:

Tommy Royston, Ph.D., is a consultant specializing in executive and leadership development. Mr. Royston is the Vice President of Strategy Development for Anavo Solutions.

## 126 Engaging Employees for Success

Thursday, March 28th / 9am-1:30pm {Virtual}

In times of disruptive change and scarce resources, it is critical that employees from all levels of the organization are fully productive and engaged in adapting to change and addressing new challenges. This interactive workshop discusses the business case for employee engagement, the conditions fostering active engagement, and simple steps for supervisors, managers, and co-workers to promote engagement.

### INSTRUCTOR:

Dr. Frank Benest is a former city manager of Palo Alto and a noted expert in organizational leadership.

# April

## 307 Realignment 101: The Basics of 1991 and 2011 Realignments

Wednesday, April 3<sup>rd</sup> 10am-4pm and Thursday, April 4<sup>th</sup> 10am-4pm

This two-day course examines the history and rationale for establishing it in 1991, why programs were included, what was learned, and the expansion to realignment in 2011 – all updated with program and funding changes through 2016. Participants first examine the establishment and programs of the 1991 realignment. Discussion details health and human services and mental health programs. Participants explore individual programs, how they work, funding and current status. The course examines the 2011 realignment – including AB 109 – with an emphasis on public safety programs. Details on the realigned programs, changes to 1991 realignment services, implementation, funding and how counties are implementing the 2011 realignment are all discussed. The second day features a detailed examination of fiscal issues: structure and allocation of local funds; flow of funds in human services, public safety, health, behavioral health, and other programs; forecasting and tracking realignment, VLF and Prop 172 funds; fund growth; and other fiscal issues.

### INSTRUCTORS:

Diane Cummins former Special Advisor to Governor Brown for state and local finances and has worked in both the executive and legislative branches on the budget; Robert Manchia, San Mateo County Chief Financial Officer; Ardee Apostol, Acting Assistant Finance Director, San Diego County Health, and Human Services Agency; Monica Bentley, Assistant Director of Finance, Riverside County Department of Public Social Services.

## 334 IT Organizational Design

Thursday, April 4<sup>th</sup> / 9am-2:30pm {Virtual}

The design of an IT organization is critical to ensuring that it is structured in a way that best suits the current and near future needs of the county, ensuring that the right capabilities are in place to meet mandates and the right structure is in place to optimize efficiency and flow. This course will help you understand how to improve and refine your IT organization, ensuring it is optimally built to provide the capabilities required to enable success for IT and the county it serves.

### INSTRUCTOR:

Steve Monaghan is the director of the Information and General Services Agency for Nevada County.

## 121 Inclusive Leadership

Thursday, April 4<sup>th</sup> / 10am-4pm {Monterey}

Inclusive leadership explores what it takes to lead in a diverse workplace while delivering results and ensuring high levels of employee engagement. The session explores culture and the levels of system that make up culture. Social Identity will be explored, and participants will have the opportunity to participate in real time experiential exercises to better explore the concept. This session will discuss leadership styles, conflict management techniques and feedback delivery models that support creating and/or enhancing inclusive workplace cultures. This course is a combination of live content delivery and participant experiential learning through role playing, small and large group discussions and self-reflection.

### INSTRUCTOR:

Regina Romeo is a former Chief Human Resources Officer and Chief Diversity Officer. She currently owns and operates her own consulting firm and provides HR consulting, DEI consulting, and expert witness services.

**369 County Financial Reporting and Budgeting for Nonfinancial Professionals**Friday, April 5<sup>th</sup> / 10am-4pm {Riverside}

This course provides the tools for decision-makers, elected officials, senior managers – other than accountants and auditors – who want to have an overview understanding of government financial reporting. Participants discuss budgets, financial statements, and the audit, and at the 30,000-foot level what each of those is saying (or not saying!). Participants should bring questions about terms or concepts they have encountered as part of their interaction with county and government financial reporting. The discussion reviews terms and definitions used with government financial reporting and strategies on how to read financial statements and auditor reports to identify critical information and understand what it means ... in plain English!

**INSTRUCTOR:**

Leanne Link, Assistant CAO at Sutter County and Chad Rinde.

**111 Resilient Leadership**Thursday, April 11<sup>th</sup> / 10am-4pm {Humboldt}

This session is targeted to proactive leaders who want to take advantage of current opportunities to apply innovative and practical approaches to employee engagement and service delivery. The interactive session is focused on helping leaders guide and energize, focus on guiding and energizing their teams and begin to reimagine the work they do, and how they do it, in response to change. Topics will include differences between management and leadership; The Boss Triad; how we are affected by, and cope with, change; and the ten most impactful actions for leaders to take now.

**INSTRUCTOR:**

Jim Delia is a Principal Consultant with Delia and Associates consulting organization.

**117 Change Leadership**Thursday, April 11<sup>th</sup> / 10am-4pm {Mariposa}

As municipalities are constantly challenged to improve service delivery, staff are confronted with the realities of adapting existing processes and establishing entirely new programs to meet growing demands. Intended or not, these changes can be highly disruptive and create chaos if not properly managed. While many of today's process improvement initiatives involve some form of system change, nearly all of them require an evaluation of the "people part" of the process. For any change to be successful, process is key. This course will provide municipal leaders with the skills and tools necessary to identify current performance standards, determine quality improvement measures, perform root-cause analysis to fully understand challenges, then built comprehensive strategies to arrive successfully at a desired end state. Along the way, the course will touch on the necessary attributes of leading people through the change process which includes the importance of effective communication, project management, and ensuring that cultural and operational factors are fully considered.

**INSTRUCTOR:** BJ Snowden is the Dean of the West Sacramento Center at the Sacramento City College, and sat on the 2021 Board of Directors of the American Leadership Forum.

**380 Talent Development and Succession Planning**Friday, April 12<sup>th</sup> / 10am-4pm {Humboldt}

This interactive course will address the urgent need to attract, retain and develop talent, especially as counties transition to the Next Normal. The session course will briefly explore strategies and best practices to create effective leadership development and succession planning programs in county government. The course includes case examples of tools to use, small group discussions as well as presentations. Discussion highlights: workforce demographic challenges facing county government; why talent development, employee engagement and succession planning are key to building organizational capacity, especially in the post-pandemic era; the need to enhance the employee experience in county government even in time of constrained resources; steps to get started; and best practices and lessons learned from leadership development and talent development programs.

**INSTRUCTOR:**

Jim Delia is a Principal Consultant with Delia and Associates consulting organization.

**158 Team Dynamics****Friday, April 19<sup>th</sup> / 10am-4pm {Fresno}**

Since the pandemic, work has fundamentally changed. Hybrid and remote work arrangements are the norm. Employees place high value on purpose, engagement, and wellbeing. And recruitment and retention of top talent remain a priority and challenge. In hierarchical organizations, leaders must also be equipped to build cross-departmental collaborations as well as lead geographically dispersed teams. This course will explore the process of developing a group of people into a trusting and psychologically safe team as well as leadership capabilities needed to foster “teaming” throughout the organization. The participants will be asked to work on an actual team-related challenge during the course. The learning approach will be highly interactive and participatory.

**INSTRUCTOR:**

Carol Geffner, Ph.D., was previously the Professor of the Practice of Governance, Management and Policy at the University of Southern California’s Sol Price School of Public Policy and Director of the Executive Master of Leadership Program. She currently is the President of CB Vision Consultants, LLC, a national management consulting and executive coaching firm.

**153 Labor Relations and Negotiations in Local Government****Thursday, April 25<sup>th</sup> / 9am-1:30pm {Virtual}**

The class examines the basics of labor relations in the county environment. Laws and regulations affecting public-sector employment and labor relations in California are examined along with techniques to build and maintain effective and productive relationships with employee groups. The class explores the various roles in labor relations and labor negotiations along with pitfalls to avoid in working with labor representatives. Techniques are examined for maintaining productive relationships with employee organizations during difficult times. Eligible for MCLE credits for members of the Bar.

**INSTRUCTORS:**

Tami Douglas-Schatz is the HR Director for San Luis Obispo County; Sarah Carrillo is the County Counsel for Tuolumne County.

**324 How to be Human at Work****Thursday, April 25<sup>th</sup> / 10am-4pm {Monterey}**

Until robots take over the world of work, we will still be showing up with all of our “humanness” every day. Contrary to popular thought, nobody really compartmentalizes or keeps the parts of our lives separate. We bring our best and our baggage. In this program, we explore what makes us human, how our emotions impact our work lives, practical advice for managing difficult people and situations, empathy, and its role in the workplace, and what it means to tend to our personal well-being at work. Workshop exercises, assessments, and tools provide new ways of thriving at work and helping others do the same?

**INSTRUCTOR:**

Rueben Brock, Ph.D. is an assistant professor of psychology at Pennsylvania Western University, California.

**389 Data-Driven Decision Making****Thursday, April 25<sup>th</sup> / 10am-4pm {Mariposa}**

Counties present complex and detailed information to decision makers and the public may fall into the trap of overwhelming the audience with too much content or complexity. This course provides strategies and techniques for presenting data, complex issues, and analytical information in a way an audience can understand and apply. Participants explore balancing content with clarity, effective use of tools such as PowerPoint, and determining what evidence to present. Using their own examples, participants examine how to present statistical data, key elements of visual design, and creation of presentations which communicate multifaceted ideas in a clear manner.

**INSTRUCTOR:** Deb Hunt, Ph.D. is the Chief Deputy Director for CSU-Sacramento's College of Continuing Education.



# May

## **158 Team Dynamics**

**Wednesday, May 1<sup>st</sup> / 10am-4pm {Inyo}**

Since the pandemic, work has fundamentally changed. Hybrid and remote work arrangements are the norm. Employees place high value on purpose, engagement, and wellbeing. And recruitment and retention of top talent remain a priority and challenge. In hierarchical organizations, leaders must also be equipped to build cross-departmental collaborations as well as lead geographically dispersed teams. This course will explore the process of developing a group of people into a trusting and psychologically safe team as well as leadership capabilities needed to foster “teaming” throughout the organization. The participants will be asked to work on an actual team-related challenge during the course. The learning approach will be highly interactive and participatory.

### **INSTRUCTOR:**

Deb Hunt, Ph.D. is the Chief Deputy Director for CSU-Sacramento's College of Continuing Education.

## **380 Talent Development and Succession Planning**

**Thursday, May 2<sup>nd</sup> / 10am – 4pm {Mariposa}**

This interactive course will address the urgent need to attract, retain and develop talent, especially as counties transition from the pandemic. The course will explore strategies and best practices to create effective leadership development and succession planning programs in county government. The course includes case examples, small group discussions as well as presentations. Discussion highlights: workforce demographic challenges facing county government; why talent development, employee engagement and succession planning are key to building organizational capacity, especially in the post-pandemic era; the need to enhance the employee experience in county government even in time of constrained resources; steps to get started; and best practices and lessons learned from leadership development and talent development programs.

**INSTRUCTOR:** Donna Vaillancourt is former San Mateo County Human Resources Director.

## **350 The Power of Connection: Building and Nurturing Professional Networks and Partnerships**

**Friday, May 3<sup>rd</sup> / 10am-4pm {Riverside}**

In this interactive workshop, participants discover ways to cultivate and to expand professional networks with a view to developing as leaders and achieving current goals. Participants commit to leadership traits and behaviors that nurture symbiotic connections and identify actions steps to enhance their ability to connect with others in meaningful ways.

### **INSTRUCTOR:**

Evie DiCiaccio was a senior development professional at leading non-profit organizations and educational institutions, such as the LA Phil and UCLA. She has a master's degree from Carleton University, and accreditation from the Hudson Institute of Coaching.

## **121 Inclusive Leadership**

**Thursday, May 16<sup>th</sup> / 10am-4pm {Humboldt}**

Inclusive leadership explores what it takes to lead in a diverse workplace while delivering results and ensuring high levels of employee engagement. The session explores culture and the levels of system that make up culture. Social Identity will be explored, and participants will have the opportunity to participate in real time experiential exercises to better explore the concept. This session will discuss leadership styles, conflict management techniques and feedback delivery models that support creating and/or enhancing inclusive workplace cultures. This course is a combination of live content delivery and participant experiential learning through role playing, small and large group discussions and self-reflection.

### **INSTRUCTOR:**

Laree Kiely, Ph.D., is president and CEO of We Will, Inc. and professor at the USC Marshall School of Business.

## 109 Recruitment Strategies

Thursday, May 16th / 10am-4pm {Mariposa}

Explore public sector recruitment strategies in 2024. This course delves into the dynamic landscape of talent acquisition, equipping public organizations with knowledge and tools needed to attract, engage, and retain their talent. Participants will gain insights into emerging trends, innovative technologies, and proven methodologies to optimize recruitment processes for greater efficiency and success and will:

- Master Targeted Outreach - Understand the importance of targeted outreach strategies in reaching diverse and qualified candidates. Learn to tailor recruitment campaigns to specific demographics, skill sets, and regions, ensuring a more expansive and effective hiring process.
- Leverage Technology - Explore latest technological advancements shaping recruitment in 2024. From artificial intelligence in candidate screening to virtual recruitment events, discover how leveraging technology can enhance efficiency and effectiveness of public sector hiring.
- Build Employer Branding for Public Entities - Develop a strong public employer brand to attract top talent. Learn essentials of crafting an appealing organizational narrative, showcasing values, culture, and benefits to create an attractive and reputable image for potential candidates.
- Understand the key factors influencing employee retention in the contemporary workplace, including organizational culture, work-life balance, and career development opportunities.
- Develop skills and strategies for identifying early signs of employee disengagement and implementing proactive strategies to address issues before they escalate by using various retention strategies, such as personalized employee development plans, performance management and flexible work arrangements.
- Learn how to conduct meaningful stay interviews and exit interviews to gain insights into employee motivations and concerns, aiding in the formulation of targeted retention initiatives.

INSTRUCTOR: Regina Romeo, Ph.D. is a former Chief Human Resources Officer and Chief Diversity Officer. She currently owns and operates her own consulting firm and provides HR consulting, DEI consulting, and expert witness services.

## 128 Emotional and Social Intelligence with Priorities

Friday, May 17<sup>th</sup> / 10am-4pm {Humboldt}

What characteristics and practices distinguish great from good performers? What evidence-based practices should be part of your daily routine to be a high performer? We will answer these questions from a 30-year database and research of top performance as we dive into the four areas of Emotional Intelligence (EI): 1) Understanding Yourself, 2) Managing yourself, 3) Understanding Others and 4) Managing Others. You will take an assessment to determine your EI strengths. Hands on tools to enhance your EI will be explored. Emotional Intelligence is a prime factor to one's success when compared to Intelligence Quotient (IQ) and technical expertise. Business simulations, practice sessions, videos and group discussions will help participants enjoy, engage, and learn more.

INSTRUCTOR:

Laree Kiely, Ph.D., is president and CEO of We Will, Inc. and professor at the USC Marshall School of Business.

## 380 Talent Development and Succession Planning

Friday, May 17<sup>th</sup> / 10am-4pm {Fresno}

This interactive course will address the urgent need to attract, retain and develop talent, especially as counties transition from the pandemic. The course will explore strategies and best practices to create effective leadership development and succession planning programs in county government. The course includes case examples, small group discussions as well as presentations. Discussion highlights: Workforce demographic challenges facing county government; why talent development, employee engagement and succession planning are key to building organizational capacity, especially in the post-pandemic era; the need to enhance the employee experience in county government even in time of constrained resources; steps to get started; and best practices and lessons learned from leadership development and talent development programs.

INSTRUCTOR:

Dr. Frank Benest is former city manager of Palo Alto and a noted expert in organizational leadership; Donna Vaillancourt is former San Mateo County Human Resources Director.



## 350 The Power of Connection: Building and Nurturing Professional Networks and Partnerships

Wednesday, May 22nd / 10am-4pm {Inyo}

In this interactive workshop, participants discover ways to cultivate and to expand professional networks with a view to developing as leaders and achieving current goals. Participants commit to leadership traits and behaviors that nurture symbiotic connections and identify actions steps to enhance their ability to connect with others in meaningful ways.

### INSTRUCTOR:

Evie DiCiaccio was a senior development professional at leading non-profit organizations and educational institutions, such as the LA Phil and UCLA. She has a master's degree from Carleton University, and accreditation from the Hudson Institute of Coaching.

## 129 Leading Across Generations

Thursday, May 23rd / 10am-4pm {Monterey}

For the first time in history, we find ourselves working with people from five generations. In today's workplace, we have to understand, communicate, and interact with people from different eras, different values and habits, and fundamentally different ideas about life! This class focuses on understanding and practicing how to integrate deeper generational insights into practice. Participants do self-assessments of their eras and their own values. They profile their work environments to discern the complexity of the generational mix. Most importantly they learn a unique set of skills and processes to employ when encountering people whose values, habits and business practices may be at odds with their own. This workshop provides participants with skills to blend generations to get the best from everyone.

### INSTRUCTOR:

Galia Cohen, Ph.D., is department head and assistant professor in the Department of Public Administration at Tarleton State University, Texas. She specializes in organizational behavior and development and has extensive experience teaching, training, and consulting in the public sector.

## 328 Increase Organizational Maturity to Drive Innovation, Performance, and Sustainability

Friday, May 24th / 9am-2:30pm {Virtual}

Get off the hamster wheel and back in control of your organization while making work a lot more enjoyable for you and your team. Many county leaders and managers feel overwhelmed and stressed with workload demands exceeding capacity, with no end or relief in sight. Leaders find themselves consumed with the day-to-day activities, leaving little or no time (or energy or passion) leftover to work on organizational development and maturity. Organizations are not meeting expectations, unable to control growing service demands, have inadequate organizational processes and systems in place, or have fallen behind on industry best practices and technology.

### Learning objectives:

- Understanding your current situation and the objectives you need to achieve
- Determine the organizational elements that need to be addressed for forward progress
- Engaging advocates, champions, and building the team for success
- Strategies for making the time to fix things
- Identify the organizational infrastructure needed to drive maturity
- Developing a roadmap to move forward

### INSTRUCTORS:

Steve Monaghan is the director of the Information and General Services Agency for Nevada County. Laree Kiely, Ph.D. is president, and CEO of We Will, Inc. and professor at the USC Marshall School of Business.

**366 Self-Care within Public Service Environments****Thursday, May 30th / 10am-4pm {Mariposa}**

This workshop is designed to normalize current experiences of distress, discuss the impact of prolonged stress, and identity/practice self-care tools. Through a mixture of psychoeducation and experiential learning, participants will gain concrete tools for managing the mental and emotional challenges of our current world climate.

**INSTRUCTOR:** Rueben Brock, Ph.D. is an assistant professor of psychology at Pennsylvania Western University, California.

# June

**366 Self-Care within Public Service Environments****Friday, June 7<sup>th</sup> / 10am-4pm {Riverside}**

This workshop is designed to normalize current experiences of distress, discuss the impact of prolonged stress, and identity/practice self-care tools. Through a mixture of psychoeducation and experiential learning, participants will gain concrete tools for managing the mental and emotional challenges of our current world climate.

**INSTRUCTOR:**

Rueben Brock, Ph.D. is an assistant professor of psychology at California University of Pennsylvania.

**339 IT Define an IT Strategy and Roadmap****Thursday, June 13th / 9am-2:30pm {Virtual}**

Many IT departments struggle to develop strategic plans that align with their organizations' strategies, are easily understood outside of IT, and demonstrate the ROI and value provided by IT. This course will look at a visual approach to developing an IT strategy. One based on organizational context and priorities; ensuring it meets rapidly changing needs and is articulated in terms the organization understands.

**INSTRUCTOR:**

Liza Massey, Chief Information Officer for Marin County.

**128 Emotional Intelligence****Thursday, June 13th / 10am-4pm {Monterey}**

What characteristics and practices distinguish great from good performers? What evidence-based practices should be part of your daily routine to be a high performer? We will answer these questions from a 30-year database and research of top performance as we dive into the four areas of Emotional Intelligence (EI): 1) Understanding Yourself, 2) Managing yourself, 3) Understanding Others and 4) Managing Others. You will take an assessment to determine your EI strengths. Hands on tools to enhance your EI will be explored. Emotional Intelligence is a prime factor to one's success when compared to Intelligence Quotient (IQ) and technical expertise. Business simulations, practice sessions, videos and group discussions will help participants enjoy, engage, and learn more.

**INSTRUCTOR:**

Mira Ringler is currently on the faculty of The Energy Project, USC Sol Price School of Public Policy, FUSE Corps, Coro Northern California, Telos Institute, and Engaged Leadership.

**180 Emotional Intelligence – A Leadership Master Class****Thursday, June 13th / 10am-4pm and Friday, June 14th / 10am-4pm {Mariposa}**

As the world changes, so do the requirements for leaders to leverage a new set of operating principles: self-awareness, self-management, motivation, collaboration, authenticity, empathy, adaptability, influence, and resilience ... Emotional Intelligence. In this engaging two-day workshop, you will discover the power of emotional intelligence and how it impacts leadership effectiveness and performance. The workshop utilizes the latest research and techniques from neuroscience, emotional Intelligence, and mindfulness to assist participants in building their leadership impact, optimize positive relationships, effectiveness, decision-making, influence, and wellbeing, all primary success factors of a great leader. Participants examine the fundamentals of EQ, its importance in leadership, and how to apply competencies and techniques to specific workplace situations. Participants complete a EQ profile and learn how EQ can be developed through practical tools and techniques.

**INSTRUCTOR:**

John Dare, CEO, Emotous USA and Angela Giacomis, CEO Emotous Australia - John brings real life experience in building and transforming organizations, as well as deep knowledge in leadership and emotional intelligence.

**116 County Budgeting and Financial Planning****Thursday, June 21<sup>st</sup> / 10am-4pm {Fresno}**

Counties have complex systems for budgeting and financial management. This course provides a comprehensive overview of the ins and outs of county budgeting and the budget process. Discussion includes a review of the County Budget Act, a year in the county budget cycle, key elements of a budget, and the integration of strategic plans into the annual budget. Participants also examine county revenue sources, sales and property tax allocation, General Fund, and special funds, creating and integrating department-recommended budgets, and public involvement in the budget process. The class explores key elements in longer-term county financial planning and management. The class is a must for everyone involved in the budget process.

**INSTRUCTOR:**

Leanne Link, Assistant CAO at Sutter County.

**373 Project Management****Wednesday, June 26<sup>th</sup> / 10am-4pm {Inyo}**

This course is designed for county employees with varying levels of experience in project management. It draws on the project management body of knowledge and delivers content through the perspective of public service and public service values. It offers a concise yet encompassing understanding of project management, and in particular project management challenges. The learning process is case study based. Upon the completion of the course county employees will develop the knowledge base for project management and project management best practices.

**INSTRUCTOR:**

Alexandru Roman, Ph.D., is a Professor with the Jack H. Brown College of Business and Public Administration at California State University San Bernardino and the Director of the Research Institute for Public Management and Governance.

## About CSAC William "Bill" Chiat Institute

CSAC William "Bill" Chiat Institute for Excellence in County Government is a professional, practical continuing education program for senior county staff and elected officials. Its goal is to expand the capacity and capability of county elected officials and senior staff to provide extraordinary services to their communities. The Institute was established in 2008 and is a component of the California Counties Foundation, Inc. and the California State Association of Counties (CSAC). Over 6,000 county staff and elected officials have taken courses. The Institute is supported by the California Counties Foundation (a 501(c)(3) charity), CSAC, grants from organizations and foundations, and course registration fees.

### Course Registration and Fees

**REGISTRATION** - Course registration may be completed on-line. Advance registration is required. To register for a class please visit [www.csacinstitute.org](http://www.csacinstitute.org).

**FEES** - Course tuition includes instruction, materials, and certificate. All county staff and officials are eligible for the special county rate of \$175/class day. Staff from county-partnered CBOs, CSAC Partners and Premier Members, and CSAC Affiliate Members are also eligible for this special reduced rate. Regular registration fee is \$351/class day.

**REGISTRATION FEES INCLUDE PROFESSIONAL INSTRUCTION, COURSE MATERIALS, AND CERTIFICATE.**

### Cancellations and Substitutions

Substitutions may be made at no charge. Registrations may be cancelled by logging into your account, e-mail or calling up to seven days in advance of the class. Refunds are subject to a \$20 handling fee. There are no refunds or credits for cancellations within seven days of a class or no-show the day of the class.

### Contact Us

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[www.csacinstitute.org](http://www.csacinstitute.org)

Visit the Institute website for updated information, course schedules and resource materials, including materials from many of the Institute's most popular classes.



### Course Schedule Index Page

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### Campus Locations

**Inyo Campus**  
205 S. Edwards Street | Independence, CA 93526

**Fresno Campus**  
Behavioral Health Auditorium A & B  
1925 E. Dakota | Fresno, CA 93726

**Humboldt Campus**  
1018 H Street | Eureka, CA 95501

**Riverside Campus**  
3450 14th Street | Riverside, CA 92501

**Monterey Campus**  
Information Technology Department  
1590 Moffett Street | Salinas, CA 93908





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# Update on Activities

## March 2024

Local government plays an integral part in shaping a thriving community. That's why ensuring that local government leaders have the best resources, connections, and knowledge available is essential for their success. With a 65-year+ history of serving the needs of local governments in California, the Institute for Local Government (ILG) supports officials at counties, special districts and cities in tackling the state's most pressing and evolving issues.

Close alignment with CSAC and our other two affiliates – the League of California Cities and the California Special Districts Association -- is critical to our success. Together with these local government partners, ILG maintains continued engagement with local leaders that affords us the opportunity to empower and educate them with real-world expertise.

We are a mission-driven nonprofit organization that is also non-partisan. And -- since ILG is not focused on advocacy -- we have the flexibility to serve as an objective third-party convener that helps cities, counties, and special districts navigate complex issues crossing multiple local and state agencies.

To learn more about our programs and resources visit [www.ca-ilg.org](http://www.ca-ilg.org), or connect with us through our [newsletter](#) or social media through [Facebook](#), [Twitter](#) or [LinkedIn](#).

## ILG is Growing!

### Welcome Christy Jewell, Senior Program Manager!



We're so excited to share that we have a new team member for our Workforce Development & Civics Education pillar with the addition of Christy Jewell!

Christy is a workforce development and business relations leader with a proven track record of spearheading strategic partnerships with education and community organizations. She loves designing, implementing and managing inclusive career counseling programs and development initiatives. Christy most recently served as the Director of Career Planning & External Workforce Development Partnerships for William Jessup University. For

more than 19 years, she has been building and nurturing strong business/education partnerships, resulting in significant growth in graduation and employment rates at the college. Christy is a well-respected leader who has



been recognized for excellence in communication, program implementation and fostering meaningful relationships.

She has also local government experience based on her roles at the Ventura County Office of Education, the Ventura Workforce Development Board and her recently elected position as a special district leader. She serves as a Director for the South Placer Municipal Utility District. Christy will play a key role in advancing ILG's WCE pillar, including the new Workforce Accelerator Fund grant, our longstanding Innovative Pathways to Public Service program, our school/university partnerships and more.

## Webinars & Trainings

ILG is committed to delivering educational content related to topics of interest to our county partners. We are in the process of mapping out webinars for 2024, but we will continue to focus on leadership, workforce development, public engagement, housing, local government basics and climate resilience. Contact Erica Manuel ([emanuel@ca-ilg.org](mailto:emanuel@ca-ilg.org)) or Melissa Kuehne ([mkuehne@ca-ilg.org](mailto:mkuehne@ca-ilg.org)) for more information or if you have suggestions for other topics you would like us to consider.

## New Training a Success: Meeting Mastery



After launching Meeting Mastery, our new meeting facilitation training for local governments in fall 2023, we hosted another session in mid-February. The sold-out training focused on providing the necessary skills to host more engaging and inclusive meetings in your community. Over two days virtually, local agency staff gained the skills and tools to plan and implement productive, interesting and engaging public meetings that center equity and allow for meaningful participation, whether in person or virtual. We will schedule additional public engagement trainings in 2024, stay tuned! [Find out more here.](#)

## Supporting Effective Local Leadership In Challenging Times

ILG's Leadership & Governance team now customizes in-person Leadership & Governance workshops for local government jurisdictions statewide. These sessions are available upon request and include intensive training for government bodies looking to expand their leadership skills. The offerings are specifically tailored for local agency councils and boards as well as their staff and cover a wide range of topics including the following:

- Effective Councils and Boards
- Goal Setting/Strategic Planning
- Civility in Public Meetings
- Governance Tools: Policy Handbooks and Codes of Conduct, Ethics and/or Civility Policies
- Building Trust through Public Engagement
- Roles and Responsibilities
- Team Building
- Communicating for Success

For questions or to schedule a briefing please email Melissa Kuehne at [mkuehne@ca-ilg.org](mailto:mkuehne@ca-ilg.org).

## Can ILG Help Your County Address Workforce Challenges? Tell Us What's Working & What's Needed!

### Non-Traditional Apprenticeships: Counties Wanted!

ILG is actively engaged in the local government apprenticeships dialogue statewide. Erica Manuel is the Chair of the Interagency Council on Apprenticeships Public Sector Subcommittee and is actively representing local government interests in many statewide and national conversations about non-traditional registered apprenticeships.

ILG is also recently secured substantial funding from the California Workforce Development Board, the Irvine Foundation and the Broad Foundation to advance the work. We have begun the ambitious work of establishing ILG as an apprenticeship intermediary and building a statewide registered apprenticeship framework for local governments. We will be actively seeking counties and county departments to pilot these new work-based learning programs and welcome conversations with interested Board Members, CAOs and other department heads about how to engage in this program and take advantage of the state and federal funding available. For more information email [apprenticeship@ca-ilg.org](mailto:apprenticeship@ca-ilg.org).

### Can Apprenticeships Help with Your Skills Gap?

What jobs are hardest to fill in your agency? Take our labor market poll. Your answers will help us shape ILG's new public sector apprenticeship program for non-traditional sectors. Email [apprenticeships@ca-ilg.org](mailto:apprenticeships@ca-ilg.org) for a link to the survey.

### Take (or share) our Professional Development Survey and Enter to Win a \$200 Gift Card! *Share Your Thoughts about Professional Development in Your County*

**FILL OUT OUR SURVEY, WIN \$200!\***

Share your thoughts about professional development in local government

We're collecting information about the current knowledge, skills, and abilities needed to support public sector employers and employees.

This short survey will help us assess the training, professional development, and future needs of California's public sector workforce.

In partnership with SDSU San Diego State University and University of San Diego

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\*Every survey respondent will be entered to win a \$200 gift card.

ILG is partnering with researchers from San Diego State University and the University of San Diego to collect information about the current knowledge, skills, and abilities needed to support public sector employers and employees. This brief survey will help us assess the training, professional development, and future needs of California's public sector workforce.

We hope you will take a few minutes to share your thoughts on this critical issue and how your experience has shaped your role in county leadership. You can access the survey here and enter to win one of ten \$200 gift cards.

[Access the survey here.](#)



**Show Off Your HR Successes!**

*Show Us Your Successful HR Policies, Advertising & Marketing Materials!*



Recruiting and retaining local government employees is one of the most important issues municipalities are facing today. That's why we're excited to launch an important workforce development initiative to support counties as they navigate recruitment and retention challenges. As part of this effort, we are building a library of successful policies and practices in this space. Our new Workforce Resource Hub will be a centralized, free digital repository of practices and resources government

employers are using to address existing workforce challenges they face currently or plan to in the future.

*Share Your Success!*

We're looking for examples of successful marketing efforts, policies, procedures, and practices related to:

- Recruitment (Process & Outreach Strategies)
- Onboarding
- Training, Mentoring & Professional Development
- Succession Planning
- Retention Strategies & Programs
- Diversity, Equity, Inclusion & Belonging Efforts
- Job Posting & Classification Updates (including revision of Minimum Qualifications)
- Marketing & Advertising Samples (including successful language & design)
- Community Engagement Efforts

If you have resources you would like to be considered for inclusion in the Resource Hub, please complete [this form on our website](#) or email it to [workforce@ca-ilg.org](mailto:workforce@ca-ilg.org)

**ILG Board Meetings**

ILG's Board of Directors met on December 19 to review, discuss, and adopt the 2024 budget. The 2024 Board meetings are scheduled for the following dates:

- Friday, March 22 (virtual)
- Friday, June 28 (virtual)
- Thursday & Friday, September 5-6 (Sacramento)
- Friday, November 8 (virtual)
- Friday, December 13 (virtual)

## California State Association of Counties 2024 Calendar of Events

*\*Updates are highlighted below*

### JANUARY

- 1 New Year's Day (observed)
- 15 Martin Luther King, Jr. Day
- 18 CSAC Executive Committee Meeting | Sacramento County
- 1/31-2/2 Executive Committee Leadership Forum | Torrey Pines, San Diego County

### FEBRUARY

- 10-13 NACo Legislative Conference | Washington DC
- 19 Presidents Day

### MARCH

- 7 CSAC Board of Directors Meeting | Sacramento County
- 13-14 CSAC Regional Meeting | Imperial & Riverside Counties
- 28 CSAC Executive Committee Meeting | Los Angeles County
- 29 Cesar Chavez Day (observed)

### APRIL

- 17-19 CSAC Legislative Conference | Sacramento
- 19 CSAC Board of Directors Meeting | Sacramento

### MAY

- 1-3 CSAC Finance Corp. Spring Meeting | Half Moon Bay, San Mateo County
- 8-10 Western Interstate Region (WIR) Conference | Mariposa County
- 27 Memorial Day

### JUNE

- 19 Juneteenth
- (new date!)* 20-21 CSAC Regional Meeting | Alameda County

### JULY

- 4 Independence Day
- 12-15 NACo Annual Conference | Tampa, Florida, Hillsborough County

### AUGUST

- 8 CSAC Executive Committee Meeting | Sacramento County
- 29 CSAC Board of Directors Meeting | Sacramento County

### SEPTEMBER

- 2 Labor Day
- 12-13 CSAC Regional Meeting | TBD

### OCTOBER

- 9-11 Executive Committee Retreat | San Luis Obispo County
- 14 Indigenous Peoples Day
- TBD CSAC Finance Corp. Fall Meeting

### NOVEMBER

- 11 Veterans Day
- 18-22 CSAC 130<sup>th</sup> Annual Meeting | Los Angeles County
- 21 CSAC Board of Directors Meeting | Los Angeles County
- 28 Thanksgiving Day

### DECEMBER

- 4-6 CSAC Officers Retreat | TBD
- 25 Christmas Day

Updated 2.22.24