

Summer/Fall 2013 Course Guide



"If your actions inspire others to dream more, learn more, do more and become more, you are a leader." – John Quincy Adams

Real discussions of real issues to develop real leadership solutions

LEADERSHIP PRACTICES

111 The Art & Practice of Elected Leadership

Leadership is a term you hear a lot, but as an elected official, how do you practice it? This course addresses the realities of leading in a turbulent political and economic environment. This timely course draws on the insights of Jim Collins' most recent book, *Great by Choice*, as well as a three-year research project on leadership and fiscal sustainability conducted by instructor Dr. Rich Callahan. The class is designed to initially invite discussion by the elected officials on the leadership challenges they have or are encountering. The course then specifically responds to those items, applying the research and empirical findings across a range of recent public sector and business sector leadership research.

Instructor: Dr. Rich Callahan is associate professor of management at the University of San Francisco. He brings practical experience working with elected officials in leadership practices.

Thursday, July 18, 2013 10:00 a.m. – 3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ All elected officials

Nature and dimensions of leadership in effective county organizations

120 The Art & Practice of Organizational Leadership

This interactive course designed for county executives and senior managers explores the practical applications of leadership in creating a high performing county organization – especially in tough financial times. Participants engage in discussions of key practices in formal and informal leadership, particularly in achieving sustainable change; employee engagement and team-building strategies; leadership when you're not in charge; and techniques for developing a vital workplace culture which supports organizational members.

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

Friday, October 4, 2013 10:00 a.m. – 3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Senior managers

Enhance practices for experienced presenters

125 Polishing the Presentation: Make Your Point!

This intensive course helps senior managers and elected officials better present their ideas with convection, control, and poise – and without fear. The course covers specific skills and advanced techniques for delivering professional presentations that get results. Participants examine their presentation style, learn to use tools to organize their presentation and communicate their thoughts, and handle difficult situations. A straightforward presentation model helps participants build their self confidence and overcome the common mistakes which turn off audiences. Use of graphics and presentation tools are also examined. Through a lab, participants work on improving one of their own presentations.

Instructors: Bill Chiat is Dean of the CSAC Institute. He is an accomplished presenter and instructor with over 35 years experience in city, county and state governments.

Friday, December 13, 2013 10:00 a.m. – 3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

Why change efforts fail – The barriers to organizational change

124 Leadership and Change: Practices to move organizations

Elected officials and executives alike discuss the need for change in their organizations, yet struggle when change seems difficult to accomplish within the depths of the organization. This course helps participants move past technical solutions to the leadership necessary for approaching adoptive challenges. Discussion highlights why some changes happen relatively quickly while others are stymied. Participants explore change from the perspective of those who the change affects. A simulation allows participants to examine the change process. Practical discussions focus on design of a change process, practices to diagnose, interpret and select interventions, and creating an environment in

Schedule at a Glance

July

- 11 (TH) 360 Managing Conflict (even hostility) in Comfort
- 18 (TH) 111 The Art & Practice of Elected Leadership
- 19 (F) 368 Cost Principles for County Government and Non-profit Partners

August

- 9 (F) 387 Grant Seeking and Grant Writing Basics
- 15 (TH) 152 Shaping the Landscape: Land Use Planning and Stewardship
- 29 (TH) 380 Talent Development and Succession Planning

September

- 6 (F) 307 Realignment 301: Where the Funds Flow
- 19 (TH) 371 Building and Maintaining a Team Environment
- 27 (F) 316 Unraveling Public Retirement Systems and Benefits

October

- 4 (F) 120 The Art & Practice of Organizational Leadership
- 10 (TH) 357 When Bad Things Happen: Managing the Unexpected
- 11 (F) 373 Leadership Practices in Project Management
- 17 (TH) 154 Safeguarding the County Dollar: Tools for Investments
- 18 (F) 363 Thinking Strategically in Trying Times

November

- 1 (F) 379 Leadership and Management Practices in the Next Generation
- 18 (M) 124 Leadership and Change: Practices to Move Organizations
- 19 (TU) 140 Interpersonal Relations – Why Won't They Change for Me?!
- 21 (TH) 386 Public Engagement in the County Budgeting Process
- 22 (F) 330 The Affordable Care Act, Realignment and California Counties

December

- 12 (TH) 366 Detecting Fraud in Government Environments – What a steal!
- 13 (F) 125 Polishing the Presentation: Make Your Point!



California State
Association of
Counties

For information and registration please visit www.csacinstitute.org

LEARN . GROW . ACHIEVE

which participants and their employees expand their capacity to address adaptive change.

Instructor: Bill Chiat is Dean of the CSAC Institute. For the last 35 years he has worked with hundreds of local agencies in crafting change.

Monday, November 18, 2013 10:00 a.m.–3:30 p.m.

AT CSAC ANNUAL MEETING

San Jose ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

Better understand yourself – and your affect on and reactions to others

140 Interpersonal Relations – Why Won't They Change for Me ?!

The key to interpersonal effectiveness – and improving your interaction with others – is better understanding yourself. Effective elected officials and senior executives have discovered the more they understand their reactions to others, know how to capitalize on their personal strengths, are able to exude an air of confidence, and have the ability to adopt their behavior to meet the needs of others – the more effective they become in achieving results with others. Learn how in this lively and insightful class.

Instructor: Bill Chiat is Dean of the CSAC Institute. He is an expert in organizational development with over 35 years experience in city, county and state governments.

Tuesday, November 19, 2013 8:30 a.m.–Noon

AT CSAC ANNUAL MEETING

San Jose ♦ \$86/person for counties ♦ 2 credits ♦ Electeds/Executives

Prepare for organizational scandals and crises

357 When Bad Things Happen: Managing Crises and the Unexpected

Counties are prepared for natural disasters ... but what about the internal crises and difficult situations? Counties have experienced federal and state investigations, embezzlement of county funds, arrest or death of an official, program failure, scandals uncovered and other unexpected situations. Are you prepared? This course focuses on the communications principles required to properly anticipate and respond to organizational crises. Case studies are analyzed to identify successful and unsuccessful agency responses. A specific set of steps are examined to prepare a communications response, including role assignments, strategies and tactics which target affected audiences, key messages which tell the county's story, and delivering the response via the media and other communications vehicles. Techniques are shared for response options, sample messages, understanding media perspective and how to avoid common pitfalls and missteps.

Instructors: Sheri Benninghoven, APR is President of SAE Communications. Scott Summerfield is an expert in public agency strategic communications.

Thursday, October 10, 2013 10:00 a.m.–3:30 p.m.

Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

Facilitate conflict constructively

360 Managing Conflict (even hostility) in Comfort

Conflicts and disagreements are a fact of life. They can contribute to better outcomes or can lead to an escalating situation. Transform the most difficult circumstances into a satisfying experience for all involved. This course helps County elected officials and executives identify constructive approaches to positively managing conflict whether from the dais, in a meeting, or one-on-one. Participants analyze their own response to conflict and develop tools to quickly assess and respond to difficult situations and create practical, positive outcomes.

Instructors: Bill Chiat is Dean of the CSAC Institute. He is an expert in facilitation and organizational development with over 35 years experience in city, county and state governments.

Thursday, July 11, 2013 10:00 a.m.–3:30 p.m.

Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

New ways to think and work through enduring problems

363 Thinking Strategically in Trying Times

This intense seminar discusses the challenges of strategic agility with the critical, enduring problems counties face. The focus is on the art of possibilities. Participants examine separating probabilities (what's likely to happen) from possibilities (what could happen) and applying concepts of creative and strategic thinking to find different paths to solutions. The conversation provides strategies 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. He brings practical experience working with elected officials in leadership practices.

Friday, October 18, 2013 10:00 a.m.–3:30 p.m.

Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

Deployment and leadership of high performance teams

371 Building and Maintaining a Team Culture

Counties use teams as a method to get work done. Teams can be project-focused, operational, interdepartmental or inter-governmental. It takes a certain organizational culture to support teams. This course examines the culture and attributes of high-performing teams in the public sector. Strategies, tools and resources are shared along with team leadership practices, and how to transition to a team culture. Participants examine the group dynamics required for team success, define team responsibilities and accountability, how to evaluate team performance against mission, and the leadership practices to lead and sponsor teams.

Instructor: Dr. Jerry Estenson is Professor of Organizational Behavior at CSU, Sacramento. He has spent 25 years in executive positions in the public and private sectors.

Thursday, September 19, 2013 10:00 a.m.–3:30 p.m.

Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

Successfully manage major county projects

373 Leadership Practices in Project Management

Project management of capital and other major projects is extremely challenging and complex. To do it well, the project manager must possess excellent communication and planning skills and direct and coordinate human and material resources throughout the life of a project by using modern management techniques to achieve predetermined objectives of scope, cost, time and quality. This course will focus on the key objectives in construction and other major project management that must be clearly defined, including a communication system, resource planning, clearly stated scope, budget, schedule and performance standards and implementation planning.

Instructors: Project management experts from Vanir Construction Management, Inc.

Friday, October 11, 2013 10:00 a.m.–3:30 p.m.

Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers



*Build organizational capacity from within the county***380 Talent Development and Succession Planning**

This interactive course will confront the “retirement wave” of baby-boomers leaving local government and 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 and succession planning are key to building organizational capacity, especially in tough times; steps to get started; and best practices and lessons learned from leadership development and succession planning programs. Ideal class to take before 379.

Instructor: Dr. Frank Benest, former city manager of Palo Alto and a noted expert in succession planning. Donna Vaillancourt is the Human Resources Director for San Mateo County.

Thursday, August 29, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

*Next generation leaders are a scarce commodity***379 Developing Leadership and Management Practices in the Next Generation**

Today more than ever counties are searching for people who can be effective leaders. This includes leaders who can set a vision and strategy, communicate effectively, build strong teams, challenge the status quo, and develop the talents of their people. The new generations of leaders, however, often have a completely different way of working and practicing leadership from their older counterparts. This course provides senior executives and human resource managers with models and strategies for developing the leadership abilities of mid-level staff – those identified as having extraordinary potential and already responding impressively to added responsibilities. Discussion highlights how to identify new leaders, recognize next generation leadership models, retention strategies, and how to integrate next generation leadership practices into the county organization.

Instructors: John King is Founding Partner and CEO of Cultural Architecture, Inc., and the Cultural Architecture Institute; Dr. Rhonda Albey in the Principle Analyst for Employee Relations in the Los Angeles County Chief Executive’s Office.

Friday, November 1, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

POLICY AND GOVERNANCE*Policies and protections to manage the county's investments***154 Safeguarding the County Dollar: Tools for Managing County Investments**

While the investment officer (county treasurer) has lead responsibility in managing a county’s funds, others also have responsibilities in overseeing the treasury. As stewards of the county’s finances it is imperative that County Supervisors, CAOs, County Counsel, Auditors-Controllers and others understand their roles as they relate to investing county funds ... and their responsibility for managing the treasury. This course will enhance county officials’ ability to critically examine their investment strategy and assess whether that strategy is being successfully implemented. The course discussion and materials will help elected officials and staff better understand investment risks and the impact of investment decisions on the county’s overall fiscal health.

Presented by the CSAC Finance Corporation.

Thursday, October 17, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

*State laws, policies and history governing county land use decisions***152 Shaping the Landscape: Land Use Planning and Stewardship**

Some of county officials’ toughest decisions are land use choices. This fast-paced course explains the basic tools of land use planning and development, explores the connections between land use, local finance, and governance, and examines how community politics influence these choices. The course promotes understanding of the key state laws that affect counties’ decisions: the Planning and Zoning Law, the California Environmental Quality Act (CEQA), and the statutes for Local Agency Formation Commissions (LAFCOs). Case studies and class exercises encourage discussions about topics that include agricultural land conservation, growth management, and regional issues (SB 375 & Sustainable Community Strategies).



Instructor: Peter Detwiler is the Senate Local Government Committee’s former staff director who helped legislators craft many of these policies.

Thursday, August 15, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

*Detailed overview of realignment accounts and funding streams***307 Realignment 301: Where the Funds Flow**

Where do realignment funds come from and how do they flow through county systems and programs? This advanced course focuses on the funding and financial elements of 1999 and 2011 realignment and a 2013 update. It takes detailed looks at the specifics of fiscal issues: source of funds, uses and restrictions, how the flow of realignment (and VLF) funding works, reporting requirements and other fiscal issues. Particular emphasis is on how the 2011 realignment affects funding and fund flow, and the changes to realignment funding made in the FY 2013-14 state budget. This class is ideal for executives, senior analysts and senior managers who manage realignment funds. Senior executives and elected officials will also find value in understanding realignment funding. Previous participation in an Institute realignment course – or significant experience – is a prerequisite.

Instructors: Andrew Pease, Executive Finance Director, San Diego County Health and Human Services Agency; Robert Manchia, San Mateo County Human Services Agency; and other experts in realignment funding.

Friday, September 6, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

*Better understand a major component of the county budget***316 Unraveling Public Employment Retirement Systems and Benefits**

This course provides a policy overview of county retirement systems and examines other post employment benefits (OPEB) and their collective impact on county finances. It covers both PERS and 1937 Act programs, how they originated, the benefits, and how they are funded. Reporting requirements and county liabilities are part of the conversation. It unveils the mysteries of understanding costs and projections and explores options and case examples for funding, reforming and managing costs of pension and OPEB systems.

Instructors: John Bartel is president of Bartel Associates, LLC and brings over 35 years experience in pension and retiree healthcare consulting; Dr. Rhonda Albej in the Principle Analyst for Employee Relations in the Los Angeles County Chief Executive's Office.

Friday, September 27, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/Executives

Current policy issue: the intersection of two major changes to counties

330 The Affordable Care Act, Realignment and California Counties

Together, the intersection of the Affordable Care Act (ACA) and Realignment account as probably the most significant change to county services and funding since Proposition 13. This policy course provides an up-to-date discussion of county implementation of ACA and the changes to realignment programs and funding that were made as part of the 2013-14 State Budget. Participants will examine what is known about how the changes will be implemented and those issues which continue to remain unresolved. It is anticipated that many of the implementation decisions will be made by this time, and this course will pull those together in a comprehensive manner for policy makers.

Friday, November 22, 2013 8:30 a.m.–Noon
AT CSAC ANNUAL MEETING
San Jose ♦ \$86/person for counties ♦ 2 credits ♦ Electeds/Executives

Fraud is alive and well – learn to detect and prevent

366 Detecting Fraud in Governmental Environments: What a Steal!

Boards, administrators, auditors and investigators have a fiduciary responsibility to oversee the financial operations of the county and county programs. This course provides a practical approach for uncovering fraud and crafting sound policies and procedures to present fraud. Participants examine the seven most common instances of fraud and the warning signs through an interactive discussion and review of several recent headlined fraud cases. It examines conditions within entities that leave them susceptible to fraud and how to revise policies and procedures to stop these kinds of fraud from occurring. Highlighted topics include: personal fraud, fraudulent charging of expenses, overriding purchasing controls, personal use of public assets, kickbacks, and control weaknesses.

Instructor: Dr. Peter Mark Hughes is Director of Internal Audit for Orange County.

Thursday, December 12, 2013 9:30 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Electeds/executives

Help your county avoid financial cost and unpleasant publicity

368 Cost Principles for County Government and Non-profit Partners

With few exceptions, counties and partner non-profits which receive grants from the federal government must follow certain cost principles. Violating these principles can result in unallowable expenditures, often culminating in large refunds and costs to counties. Understand the cost principles applicable to county governments and nonprofit organizations and learn how to ensure that costs claimed against government grants are allowable, and therefore, reimbursable. Topics include: criteria for determining allowable costs, permissibility of specific items of cost and how to adequately document costs claimed.

Instructor: Sefton Boyars, CPA, CGFM, CFS from the California Certified Public Accountants (CalCPA) Education Foundation.

Friday, July 19, 2013 9:30 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers

Expand community involvement and build public acceptance

386 Public Engagement in the County Budget Process

County Boards and executives must make difficult decisions in the budgeting process which affect county services and quality of life for the community. This course explores methods for community involvement in the budget process to help counties generate new ideas, make effective decisions and build public acceptance of decisions. Participants explore practical tips to maximize the effectiveness of public forums, budget hearings, town halls, and other forms of community engagement in budget decisions. Participants examine techniques that help the public take into account the hard choices and trade-offs in decisions, and how to demonstrate that public ideas and recommendations are taken seriously.

Presented by the Institute for Local Government.

Thursday, November 21, 2013 1:00 p.m.–5:00 p.m.
AT CSAC ANNUAL MEETING
San Jose ♦ \$86/person for counties ♦ 2 credits ♦ Electeds/Executives

Successfully connect with foundations for funding innovative programs

387 Grant Seeking and Grant Writing Basics

Do you want to learn how the funding research process works, and what tools and resources are available? This course provides a policy-level introduction to grant seeking and grant writing. It examines grant sources for counties, how to partner for grants, and policies for seeking and managing grants. The class will cover: what you need to have in place before seeking a grant; the world of grantmakers; the grant seeking process; and available tools and resources. Participants examine what to include in a proposal to a foundation, tips for making a proposal stronger, what funders expect to see in proposals, and tips for communicating with funders during the grant process.

Instructor: Sarah Jo Neubauer is Training Coordinator of the Foundation Center, the leading source of information about philanthropy worldwide.

Friday, August 9, 2013 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Executives/managers



Register for three or more classes at the same time and save \$20/class!

Discount given at time of registration.

Registration fee includes instruction, materials and lunch*

*except two credit classes

Course schedule and descriptions subject to change.

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Eligible for CPE credits

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