

Summer-Fall 2018 Course Guide

Learn as if you were to live forever. – Mahatma Gandhi

Professional development classes for county officials, executives and managers

Schedule at a Glance

DATE		LOCATION	PAGE
JULY			
12 (TH)	Customer Service in the Public Sector	Shasta/Tehama	3
19 (TH)	Financial Management: Debt & Investment of Public Funds	Sacramento	3
20 (TH)	Building and Maintaining a Team Environment	Contra Costa	2
19 (F)	State Budget 101: What Counties Need to Know	Sacramento	7
26 (TH)	Facilitation – The Basics of Bringing People Together	Sacramento	3
AUGUST			
2 (TH)	IT Organizational Culture	Sacramento	5
3 (F)	Engaging Employees for Success	Sacramento	3
9 (TH)	Art & Practice of Organizational Leadership	Shasta/Tehama	2
16 (TH)	GASB Financial Reporting Requirements	Sacramento	4
16 (TH)	Mastering Social Media Basics	Contra Costa	6
23 (TH)	Intergenerational Leadership	Sacramento	4
SEPTEMBER			
13 (TH)	Leadership & Change: Practices to Move People	Shasta/Tehama	5
14 (F)	Communication with Influence	Sacramento	2
14 (F)	Storytelling and Other Practices in the Art of Persuasion	Orange	7
20 (TH)	Labor Relations and Negotiations	Contra Costa	5
21 (F)	How to be Human at Work	Sacramento	1
21 (F)	Leadership & Change: Practices to Move People	Tulare	5
27-28	Two-Day Class Realignment 101: Basics of 1991 and 2011	Sacramento	7
OCTOBER			
4 (TH)	IT Focused Contracting	Sacramento	4
5 (F)	Leadership by Values: Success in Public Service	Sacramento	5
11 (TH)	Managing Conflict in Comfort	Shasta/Tehama	5
12 (F)	Managing Conflict in Comfort	Orange	5
18 (TH)	Polish the Presentation: Advanced Practices	Contra Costa	6
18 (TH)	Capital Improvement Planning & Funding	Sacramento	2
19 (F)	County Budgeting & Financial Planning	Sacramento	2
19 (F)	Purpose, Outcomes and Intentionality: Make Things Happen	Tulare	6
25 (TH)	Unravelling Public Pensions and Retirement Benefits	Sacramento	7
NOVEMBER			
2 (F)	Local Governance in California: All those agencies!	Sacramento	5
9 (F)	Emerging Issues Connected and Autonomous Vehicles	Sacramento	3
9 (F)	Financing California Counties: A History of Sources	Orange	4
16 (F)	Art & Practice of Organizational Leadership	Tulare	2
30 (F)	World Class Contracting and Procurement	Sacramento	7
DECEMBER			
6 (TH)	IT Executive Cybersecurity	Sacramento	4
7 (F)	Resiliency: Recover, Adapt and Sustain	Sacramento	1
13-14	Two-Day Class Performance Measurement Workshop	Sacramento	6
14 (F)	Purpose, Outcomes and Intentionality: Make Things Happen	Orange	6
21 (F)	Financial Reporting for Nonfinancial Professionals	Tulare	2

NEW FOR THIS SEMESTER

Personal Literacy: The human side of our professional life

How to be Human at Work

324

New! Until robots take over the world of work, we will still be showing up with all of our “human-ness” 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 class 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: Laree Kiely, Ph.D. is president and CEO of We Will, Inc. and former professor at the USC Marshall School of Business.

Friday, September 21, 2018

10:00 a.m.–3:30 p.m.

Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Rebound from the untoward effects of adversity and uncertainty

Resiliency: Build an Organization to Recover, Adapt and Sustain

323



New! Counties operate in a volatile and complex world, where anticipated and unanticipated challenges emerge regularly. The key is to not only survive such events, but to prosper as an organization. Resiliency is the ability to cope with the challenges, problems

and set-backs organizations and individuals face. This class defines the attributes of resiliency and focuses on strategies to build a culture of resiliency in your organization and employees. Exercises and discussion focus on three traits of resiliency: staunch acceptance and communication of reality; ability to observe and interpret meaning in messy and terrible situations; and the skills to innovate with resources at hand. Course exercises and discussion provide practical tools to build an organizational culture of resiliency.

Instructor: Bill Chiat is Dean of CSAC Institute and has worked with local governments across the West in building organizational capacity.

Friday, December 7, 2018

10:00 a.m.–3:30 p.m.

Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Nature and dimensions of leadership in effective organizations

Art & Practice of Organizational Leadership 120

This interactive course designed for both experienced and new senior county managers explores the practical applications of leadership in creating a high performing county organization – especially in the difficult environments counties operate. 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 in organizational leadership and management.

Thursday, August 9, 2018 10:00 a.m.–3:30 p.m.
Shasta-Tehama ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Friday, November 16, 2018 10:00 a.m.–3:30 p.m.
Tulare ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Deployment and leadership of high performance teams

Building and Maintaining a Team Environment 371

Counties use teams as a method to get work done. It takes a certain organizational culture to support teams. This course examines the culture and attributes of high-performing teams in the public sector. Hands on simulations demonstrate team strategies. 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 Sacramento State University.

Thursday, July 19, 2018 10:00 a.m.–3:30 p.m.
Contra Costa ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

“Emotions drive people...people drive performance” – Josh Freedman

Communication with Influence 130

The ability to have quality conversations, including techniques to engage stakeholders at all levels and build relationships, depends upon one’s ability to communicate effectively. The class explores your preferred communication style and its impact on others to improve your ability to communicate with clarity, impact and confidence. The highly interactive day will enhance your ability to have quality conversations with individuals, teams and key stakeholders. You will learn how to identify people’s preferred communication style and how to relate to differing styles to build rapport, create and lead conversations with maximum impact and effectiveness.



Instructors: Angela Giacomis is CEO of Careerlink, and works at the nexus of business and neuroscience; John Dare transforms organizations to thrive in accelerating change as a Silicon Valley entrepreneur.

Friday, September 14, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Create a schedule and funding options for critical public infrastructure

Capital Improvement Planning and Funding 155



You’ve heard about a “CIP” in your county? This class will help you better understand what it is, how a Capitol Improvement Plan is developed, management of CIP projects and programs, funding sources, and what questions you should be asking. The class examines a range of CIP projects from county facilities and jails, to roads and county infrastructure. Discussion reviews types of information that should be available to decision-makers and the community.

Thursday, October 18, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

TAKE THIS WITH County Budgeting and Financial Planning ON OCTOBER 19

Overview of county budgeting and financial management

County Budgeting and Financial Planning 116

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 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. Class is a must for everyone involved in the budget process.

Instructors: Patrick Blacklock is County Administrator of Yolo County, and Robert Bendorf is County Administrator of Yuba County.

Friday, October 19, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

TAKE THIS WITH Capital Improvement Planning and Funding ON OCTOBER 18

Understand and interpret county financial reports

County Financial Reporting and Budgeting for Nonfinancial Professionals 369

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: Laura Lindal, CPA, is an experienced auditor and an instructor for the California CPA Education Foundation.

Friday, December 21, 2018 10:00 a.m.–3:30 p.m.
Tulare ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Create customer satisfaction in a county setting

**Customer Service in the Public Sector:
Balancing Satisfaction with Priorities** 354

Strategies to create and enhance a customer service culture for their agency is the focus of this class for managers and executives. Participants explore how to balance great customer service with county and state regulations and requirements. It focuses on what defines good customer service and a service culture. Lively small and large group conversations provide tools to assess the current environment, gaps to be more service oriented, and how to get there. The structure and process to support and recognize effective customer service are examined -- even in difficult regulatory situations. Barriers to good customer service are discussed along with service and performance measurements.

Instructor: Angela Antenore, M.Ed. is an experienced agency manager, agency board member and university instructor.

Thursday, July 12, 2018 10:00 a.m.–3:30 p.m.
Shasta-Tehama ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

steps for supervisors, managers and co-workers to promote engagement.

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

Friday, August 3, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Hands-on practices to facilitate internal & community meetings

**Facilitation Skills: The Basics of
Bringing People Together** 377



County staff can play an important facilitative role to encourage agencies, community groups, neighborhoods and others to have a conversation to problem solve and seek solutions together. Facilitation skills are a powerful leadership practice – particularly when you don't have formal authority to work through

adaptive challenges or difficult problems. Whether you facilitate teams, inter-departmental or public meetings, or any group ... the skills from this class will be of value. This workshop introduces the basics of facilitation and provides participants with a wide range of hands-on practices and techniques.

Instructor: Bill Chiat is Dean of the CSAC Institute and has facilitated hundreds of local government workshops and meetings.

Thursday, July 26, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Make informed decisions about the use of public resources

**Financial Management: Debt and Investment
of Public Funds** 117

Elected and appointed officials make critical decisions on the issuance and administration of debt, and the investment of public funds, but may have little experience or depth of knowledge on this complicated subject. This class provides a foundation on understanding debt, debt capacity, options, and county policy on debt. It examines the fiduciary responsibilities of elected and appointed officials and then explores investment of public funds. An overview of prudent investment policy, portfolio strategy and the role of the investment advisors are also explored. *Eligible for MCLE credits for members of the Bar.*



Instructors: Alan Fernandes, Chief Executive Officer - and experts from - the CSAC Finance Corporation.

Thursday, July 19, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

TAKE THIS WITH State Budget 101 ON JULY 20

EMERGING ISSUES

Exploring trends in policy issues

These seminars provide county decision-makers an opportunity to explore emerging trends with colleagues and experts. Brief presentations examine facets of the issue and allow opportunities for discussion on resources, capacity and authority available for counties to work toward solutions.

Self-driving cars are finally here; how they are deployed will change how we get around forever

**Emerging Issues: The Future is Already Here:
Connected and Autonomous Vehicles** 404

The technology necessary to deploy autonomous and connected vehicles is no longer a prediction of the future. There are currently 10 automated vehicle testing grounds in the U.S., two of which are in California. The implications of this technology are far reaching and can be both beneficial and potentially disruptive to mobility, the economy and overall quality of life. Other economic advancements such as transportation network companies may have compounding effects on the implications of this rapidly-changing technology. The discussion will provide insights on connected and autonomous vehicles and the range of potential local policy implications, and will facilitate a conversation about what this means for counties.

Facilitators: Kiana Valentine, CSAC Senior Legislative Representative, and policy experts from around the state.

Friday, November 9, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Elected Officials/Staff



Leadership can't be exercised alone

Engaging Employees for Success 126

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

The context of county-state revenue relationships

Financing California Counties: The History 151

Have you found yourself overwhelmed trying to understand the county revenue sources and funding streams? And how we ended up with this complex system? This course provides an in-depth examination of the history of county revenue sources and how they have evolved over decades. Exploring the context of county funding decisions by the legislature and administration over the last 40 years is critical in understanding the current state-county funding and revenue relationships. The class examines the history and consequences of major elements in county revenues including: Proposition 13, 172, 1A, Vehicle License Fees, Realignment, ERAF, property tax allocations, current year State budget and more.

Instructor: Diane Cummins is Special Advisor to the Governor on State and Local Realignment.

Friday, November 9, 2018 10:00 a.m.–3:30 p.m.
Orange ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Juggling a workforce with teens to seniors – leadership for everyone

Intergenerational Leadership 129

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 skills to blend generations to get the best from everyone.

Instructor: Larry Liberty, Ph.D. works with Fortune 500 companies and teaches in MBA programs across the globe, and is author of *The Maturity Factor – Solving the Mystery of Great Leadership*.

Thursday, August 23, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

The impact of GASB 34 for local governments continues to reverberate

GASB Financial Reporting Requirements 364



GASB 34, Basic Financial Statements – and Management's Discussion and Analysis – continues to change the way counties prepare and review their financial reports. This course will build you understanding of GASB 34, and implementation of recent GASB pronouncements -- including GASB 75, exposure drafts and future agenda items. Participants review key

concepts such as basic financial statement formats, reconciliations of government-wide financial statements to the funds financial

statements, note disclosures and infrastructure capital assets. The class also highlights accounting, financial reporting and disclosure issues; new pension standards: GASB 67 and 68; and review of the county Comprehensive Annual Financial Report. *Eligible for CPE credits for CPAs and MCLE credits for members of the California Bar.*

Instructor: Kenneth H. Pun, CPA, CGMA is the Managing Partner of the Pun Group Accountants and Advisors.

Thursday, August 16, 2018 9:30 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

Information security is about sustainability of the county

IT Executive Cybersecurity 346

The technology of today has completely unleashed information in terms of volume, variety, and velocity, and as a result, information has become more critical than ever to competitive, strategic, operational, and even personal decision-making. This also means an organization's



information is that much more attractive to someone on the outside, and many outsiders have malicious intent. Advanced persistent threats are already here, and the increasing numbers and use of mobile devices and cloud storage only heightens exposure by increasing the number of potential attack points. This course provides county IT leaders with knowledge and tools to achieve a comprehensive understanding of where counties are at risk for security threats and attacks, how to prioritize and build out security initiatives, the technology available to establish end-to-end protection, and how to ensure compliance from the weakest link in any security system – the human user.

Instructor: Valence Howden is a Research Director in the CIO Advisory Group at Info-Tech Research Group

Thursday, December 6, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ IT Managers/Executives

It takes a sophisticated contract administration to manage contracts

IT-Focused Contracting 348

External services are attractive. They enable organizations to tap into economies of scale – and with the advent of cloud/hosted deployments, IT services can be procured at exponentially cheaper rates. However, entering into complicated agreements with multiple vendors requires an equally sophisticated contract administration system to manage procurement, negotiate (and renegotiate) terms, take advantage of promotional pricing and licensing, and coordinate payment schedules. Without proper vendor management, organizations miss out on potential cost savings to be realized within their contracts, and in a county government a dollar saved on service agreements is an additional dollar to create municipal services. This course examines concepts and tools to establish a process to govern the selection of vendors and subsequent management of vendor relationships, risk and performance.

Instructor: Valence Howden is a Research Director in the CIO Advisory Group at Info-Tech Research Group

Thursday, October 4, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ IT Managers/Executives

Dealing with the ABC's of IT (Attitude, Behavior and Culture)

IT Organizational Culture 338

Despite all the expertise, training and consulting developed over the last 20 years, we continue to struggle to implement IT initiatives, adopt activities and processes to achieve business needs. We have challenges creating buy-in, overcoming resistance and embedding changes in

organizational behavior and culture. This is due to the ABC's (Attitude, Behavior and Culture) of IT. 'ABC is like an Iceberg, much of it hidden beneath the surface yet capable of causing enormous damage'. In this session we will discuss how to recognize and address ABC issues within your organization.

Instructor: Valence Howden is a Research Director in the CIO Advisory Group at Info-Tech Research Group.

Thursday, August 2, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ IT Managers/Executives

Employees are every county's largest budget item

Labor Relations and Negotiations in Local Government 153

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: Richard Whitmore and Richard Bolanos are partners with Liebert Cassidy Whitmore and work extensively with local governments on labor relations.

Thursday, September 20, 2018 10:00 a.m.–3:30 p.m.
Contra Costa ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Why change efforts fail - and how to remove those barriers

Leadership & Change: Practices to Move People and Organizations 124

County officials and managers discuss the need for change in their organizations, yet struggle when change is difficult to accomplish within the depths of the organization. This course helps participants move past technical solutions to the practices for approaching adoptive challenges. Discussion highlights why some changes happen relatively quickly while others are stymied. Participants explore change from the perspective of those whom the change affects. Practical discussions focus on design of a change process; practices to diagnose, interpret and select interventions; barriers; and creating an environment in which people can expand their capacity to address adaptive change.

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

Thursday, September 13, 2018 10:00 a.m.–3:30 p.m.
Shasta-Tehama ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, September 21, 2018 10:00 a.m.–3:30 p.m.
Tulare ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Harnessing the power of purpose

Leadership by Values: Strategies for Success in Public Service 122

UPDATED! Understanding the relationship of values to decisions can be a helpful decision-making tool. Focusing on commonly held (although sometimes competing) values underlying difficult policy dilemmas can help leaders bridge differing perspectives—either while policies are being debated or after difficult decisions have been made and need to be explained. In addition, clearly articulated organizational values provide staff with important information on an organization's priorities. This course explores the role values play in both personal and organizational leadership, strategies to consider in modeling organizational values, and approaches to making and explaining difficult decisions.



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

Friday, October 5, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

JPA-Special Districts-MPO-LAFCo-COG-Cities-CSA: What do they all do?

Local Governance in California: All Those Agencies! 150

California has a complex system of providing services through local governments. This course provides an overview of local government structure and responsibilities in California. You'll learn the basics of all the local agencies and how they interrelate with county responsibilities. A brief history of California governance is followed by a review of the roles and responsibilities of the state, cities, counties, special districts and an alphabet soup of other local agencies. Discussion highlights the authority and responsibilities of the county as it relates to other agencies through a county case study on the interrelationships of all these local agencies.



Instructor: Bill Chiat, CSAC Institute Dean, former executive director of the California Association of Local Agency Formation Commissions and experienced executive in county, district and city governments.

Friday, November 2, 2018 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Facilitate conflict constructively

Manage Conflict (Even Hostility) in Comfort 360

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.

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

Thursday, October 11, 2018 10:00 a.m.–3:30 p.m.
Shasta-Tehama ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, October 12, 2018 10:00 a.m.–3:30 p.m.
Orange ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

The 211 on social media 101 to avoid a communication 911

Mastering Social Media Basics 353

Confused about social media, which platforms are right for you, how to find time to manage it, what to post? This class will help you understand what to focus on, how to implement it, and ways to quickly create compelling content using the latest photo, audio and video techniques! You will explore popular social media sites along with concrete tips, tools, apps and hands-on interaction that will help you become a social media Ninja (or at least have more confidence!). Valuable whether you're a newbie or seasoned practitioner you will go away with knowledge and techniques to implement immediately.

Instructor: Kerry Shearer is former Sacramento County Public Information Officer and a consultant specializing in social media.

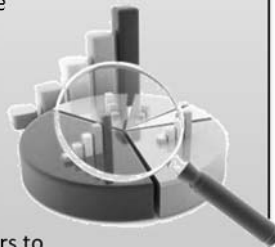
Thursday, August 16, 2018 10:00 a.m.–3:30 p.m.
Contra Costa ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

SPECIAL TWO-DAY INTENSIVE WORKSHOP

Measurement influences behavior and drives performance

Performance Measurement and Management: Accountability for Results 370

World-class public agencies recognize the critical role of performance management and measurement in helping define the strategy, public value and performance expectations of the organization as well as aligning individual and agency decision-making toward desired public value creation. They also help managers assign and use resources effectively. Because the public is demanding accountability and transparency from government, performance measurement is a leadership practice for county managers to better plan and manage outcomes and not just activities. The workshop focuses on designing effective and realistic performance measurement systems. Participants explore practical approaches, techniques and tools to create, implement and analyze measurements to improve county performance and better communicate outcomes to the community. Hands-on exercises examine criteria for measurement selection, with time for participants to develop balanced, outcome-based measures for their agencies.



Instructors: Laree Kiely, Ph.D. is president and CEO of We Will, Inc. and professor at the USC Marshall School of Business; Bill Chiat is Dean of CSAC Institute and former CEO of Napa County.

Thursday-Friday, December 13-14, 2018
 10:00 – 4:30 p.m. Thursday and 8:30 – 3:00 p.m. Friday
Sacramento ♦ \$298/person for counties ♦ 6 credits ♦ Staff/Elected Officials

FINANCIAL MANAGEMENT SERIES
Take a series of classes to enhance competencies

- ✦ Financial Management: Debt & Investment of Public Funds – July 19
- ✦ State Budget 101: What Counties Need to Know – July 20
- ✦ GASB Financial Reporting Requirements – August 16
- ✦ Capital Improvement Planning and Funding – October 18
- ✦ County Budgeting & Financial Planning – October 19
- ✦ Unravelling Public Pensions and Retirement Benefits – October 25
- ✦ World Class Contract Management and Procurement – November 30



For experienced presenters wanting to 'up' their presentations

Polish Your Presentation: Advanced Practices in Communication 125

This intense class helps senior managers and elected officials better present their ideas with conviction, 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.

Instructor: Bill Chiat is Dean of the CSAC Institute and an accomplished presenter with city, county and state governments.

Thursday, October 18, 2018 10:00 a.m.–3:30 p.m.
Contra Costa ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Intentionality: Tying together activities to build performance

Purpose, Outcomes and Intentionality: Make Things Happen in Your Agency 113

We all have those nagging problems that lurk in the background, the ones you know you should tackle but never seem to have time. They are often the big hairy ugly ones we really don't want to tackle. Or worse, we've made them "unsolvable", working around rather than tackling them. This class provides a much needed break to really examine these issues. Participants take a step back to identify the roots of the issues, re-frame them as necessary, and then identify alternative strategies, reducing roadblocks, sequencing steps, identifying stakeholders and developing flexibility in getting to your goals. The class is about creating a mind-set for tackling problems and knowing whether you're making progress or not. Be prepared to be challenged, and encouraged to think in new ways.



Instructor: Mary Kirlin, DPA is a former professor and department chair in public policy at Sacramento State University.

Friday, October 19, 2018 10:00 a.m.–3:30 p.m.
Tulare ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, December 14, 2018 10:00 a.m.–3:30 p.m.
Orange ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

SPECIAL TWO-DAY INTENSIVE WORKSHOP*Context, structure and funding of realignment in California***Realignment 101: The Basics of 1991 and 2011 Realignments**

307

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, Special Advisor to the Governor on State and Local Realignment; Andrew Pease, Finance Director, San Diego County Health and Human Services Agency; and Robert Manchia, San Mateo County Human Services Agency.

Thursday - Friday, September 27-28, 2018

10:00 – 4:30 p.m. Thursday and 8:30 – 3:00 p.m. Friday
 Sacramento ♦ \$298/person for counties ♦ 6 credits ♦ Staff/Analysts

*We depend on it ... How does that state budget process work??***State Budget 101:****What Counties Need to Know**

396

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 the budget decisions.

Instructors: Diane Cummins is Special Assistant to the Governor and has worked in both executive and legislative branches on the budget; Jean Hurst is Principal with HBE Advocacy and long-time legislative advocate on local government finance.

Friday, July 20, 2018 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Managers/Executives

*Storytelling is one of life's most powerful skills***Storytelling and Other Leadership Practices in the Art of Persuasion**

378

Persuasion is interpreted as an attempt to evoke a voluntary change in the attitude or behavior of another person. Effective leaders are able to tell stories that speak to others and markedly influence their behaviors. Through hands-on exercises the class explores elements of storytelling and how to construct and use stories in the practice of

leadership. Participants examine case studies and experiences to develop their own stories. Other practices examined include metaphors, humor, reciprocity, contrast and conformity. These tools are placed in the context of enhancing the transaction between leader and follower and authentically hearing the needs of listeners.

Instructor: Bill Chiat is Dean of the CSAC Institute and has been a practitioner of leadership (and storytelling) for 35 years.

Friday, September 14, 2018 10:00 a.m.–3:30 p.m.
 Orange ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

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

365

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 (including rate stabilization funds) of pension and OPEB systems. Other post-employment benefits and their impact on county finances. An emphasis is placed on recent reforms to state law and county retirement systems and how is affecting county policies and operations.



Instructor: John Bartel is president of Bartel Associates, LLC and brings over 35 years experience in pension and retiree healthcare consulting.

Thursday, October 25, 2018 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*Manage county resources effectively and efficiently***World Class Contracting, Contract Management and Procurement**

392



Every County or public entity requires the effective procurement of goods and services in order to successfully achieve its mission, business objectives and meet the needs of its constituents. This class provides insight into fundamental principles of public contracting and procurement, the role of contracting and procurement within your organization, as well as, best in class strategies which lead to effectively and efficiently meeting your requirements. Discussion will cover the principles and key elements of contract management and procurement process, and will provide participants a broad understanding of various contracting approaches, best practices, and will discuss practical examples of contract monitoring tools and templates. Prior and during this session, participants will be invited to submit specific contracting and procurement situations and questions, which they would like to be discussed during the session.

Instructor: Jack Pellegrino, CPCM is the Director of Purchasing and Contracting for the County of San Diego and an Instructor at San Diego State University. He is a Certified Contracts Manager.

Friday, November 30, 2018 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$149/person for counties ♦ 3 credits ♦ Staff/Elected Officials

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Institute Courses by Topic

COURSE	LEADERSHIP COURSES	PAGE
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124	Leadership & Change: Practices to Move Organizations	5
125	Polish the Presentation: Advanced Practices	6
126	Engaging Employees for Success	3
129	Intergenerational Leadership	4
130	Communication with Influence	2
323	New Resiliency: Recover, Adapt and Sustain	1
324	New How to Be Human at Work	1
354	Customer Service in the Public Sector	3
360	Managing Conflict in Comfort	5
371	Building and Maintaining a Team Environment	2
377	Facilitation Practices: The Basics of Bringing People Together	3
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COST-EFFECTIVE SOLUTION FOR COUNTY SUCCESSION PLANNING AND EXECUTIVE DEVELOPMENT

*Registration fees includes professional instruction,
course materials, certificate and lunch*

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.



CSAC 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 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 operated by the California Counties Foundation (a 501(c)(3) charity) on behalf of the California State Association of Counties (CSAC). Nearly 6,000 county staff and elected officials have taken courses. The Institute is supported by CSAC, the California Counties Foundation, grants from organizations and foundations, and course registration fees.

Course Locations

Sacramento – Courses are held in downtown Sacramento at the Capital Event Center at the M.A.Y. Building, 1020 11th Street.

Contra Costa – Courses are hosted by Contra Costa County and held in Martinez at the Department of Child Support Services, Diablo Room, 50 Douglas Drive.

Tulare – Courses are hosted by Tulare County and held in Visalia at the Human Resources & Development Department building, 2500 W. Burrel Avenue.

Orange – Courses are hosted by Orange County and held in Santa Ana at the Orange County Waste & Recycling Department Community Room, 300 North Flower Street, Suite 400.

Shasta – Courses are hosted by Shasta and Tehama counties and held in Redding at the Best Western Hilltop Inn, 2300 Hilltop Drive.

Course Registration and Fees

Registration – Course registration is done on-line. *Advance registration is required.* Because of limited class size we cannot accommodate registration at the door. To register for a class please visit www.csacinstitute.org.

Fees – Course tuition includes instruction, materials, certificate and lunch. All county staff and officials are eligible for the special county rate of \$149/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.

Discounts – Reduced tuition is available to county staff and officials when registering for three or more classes at the same time or with the purchase of the Credential Package. Save at least 10% with these options.

Cancellations and Substitutions – Substitutions may be made at no charge; substitutions are not allowed for individuals in a credential package. 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.

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