

Winter-Spring 2016 Course Guide

"Learning is not attained by chance; it must be sought for with ardor and diligence." – Abigail Adams

Professional development for county officials, executives and managers

Schedule at a Glance

DATE		LOCATION	PAGE
JANUARY			
8 (F)	Talent Development and Succession Planning	SAN DIEGO	6
14 (TH)	Cost Principles and the Supercircular: Federal Grants	SAC	2
15 (F)	Negotiations and Collaboration in Complex Environments	MERCED	4
21 (TH)	Effective Use of Social Media	SAC	4
21 (TH)	Leadership and Change: Practices to Move Organizations	MARTINEZ	3
28 (TH)	Financing California Counties	SAC	3
FEBRUARY			
4 (TH)	IT Performance Metrics and Customer Value Management	SAC	7
12 (F)	When Bad Things Happen: Media and Crises	SAN DIEGO	6
18 (TH)	Coping with Ambiguity	MARTINEZ	2
19 (F)	Leveraging Customer Relationships	MERCED	4
19 (F)	Polishing the Presentations: Advanced Practices	SAC	5
26 (F)	Unraveling County Pensions and Retirement Benefits	SAC	6
MARCH			
4 (F)	Recruiting and Hiring Senior Executives	SAC	5
10-12	Executive Leadership Symposium	SAN JOSE	
11 (F)	Financing California Counties	SAN DIEGO	3
17 (TH)	Building and Maintaining a Team Environment	MARTINEZ	1
18 (F)	Optimizing Effectiveness: Managing Organizational Crises	SAC	5
18 (F)	County Financial Reporting for Nonfinancial Professionals	MERCED	2
APRIL			
7 (TH)	IT Business Analysis	SAC	7
8 (F)	Building and Maintaining a Team Environment	SAN DIEGO	1
14 (TH)	<i>Emerging Issues: Homelessness in Our Communities</i>	SAC	2
15 (F)	State Budget 101: What Counties Need to Know	MERCED	5
21 (TH)	Communicating and Presenting Complex Information	MARTINEZ	1
22 (F)	Leading with Emotional Intelligence	SAC	3
29 (F)	Negotiations and Collaboration in Complex Environments	SAC	4
MAY			
12 (TH)	Service Excellence through Process Improvement	SAC	5
13 (F)	County Financial Reporting for Nonfinancial Professional	SAN DIEGO	2
19 (TH)	Managing Conflict (even hostility) in Comfort	MARTINEZ	4
19 (TH)	State Budget 101: What Counties Need to Know	SAC	5
20 (F)	When Bad Things Happen: Media and Crises	MERCED	6
26 (TH)	World Class Procurement and Contract Management	SAC	6
JUNE			
3 (F)	Advanced Practices in Negotiations	SAC	4
9 (TH)	IT Service Management	SAC	7
10 (F)	Leadership and Change: Practices to Move Organizations	SAN DIEGO	3
16 (TH)	Negotiations and Collaboration in Complex Environments	MARTINEZ	4
17 (F)	Leadership and Change: Practices to Move Organizations	MERCED	3
23-24	<i>Special Workshop: Facilitation Practices for Managers</i>	SAC	3

Course Descriptions and Schedule

Deployment and leadership of high performance teams

Building and Maintaining a Team Culture 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. 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.

Thursday, March 17, 2015 10:00 a.m. – 3:30 p.m.
Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

Friday, April 8, 2016 10:00 a.m. – 3:30 p.m.
San Diego ♦ \$129/person for counties ♦ 3 credits ♦ Managers/executives

Effective visual display of complex information

Communicating and Presenting Complex Issues and Data 389



Counties present complex and detailed information to decision-makers and the public, and 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: Dr. Mary Kirlin is associate professor of Public Policy and Administration at CSU-Sacramento.

Thursday, April 21, 2015 10:00 a.m. – 3:30 p.m.
Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

Tools for tackling unprecedented challenges

Coping with Ambiguity: Leadership for Challenging Times 375



Counties operate in complex and changing environments. Within these unpredictable economic contexts and unprecedented challenges, county leaders find themselves trying to make past practices and models fit current realities. But that may be a mistake in coping with ambiguity. This class provides a new way to

think about applying leadership practices – at both elected and executive levels – to help your county organization and community find new realities and ways of effectively working in uncertain times. Discussion topics include: 1) understanding the concept of “emergent” processes and environments; 2) tools for managing uncertainty; 3) the mental discipline and the rational analysis of situations; and 4) communication tools for managing ambiguous situations.

Instructor: Laree Kiely, Ph.D. is president of the Kiely Group and professor at the USC Marshall School of Business.

Thursday, February 18, 2016 10:00 a.m.–3:30 p.m.
Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

The Supercircular: OMB’s Final Guidance on Federal Grants

Cost Principles, Reporting Requirements ... and the “Supercircular” 368

On December 26, 2013, the U.S. Office of Management and Budget issued new reporting rules referred to as the “Supercircular.” This issuance impacts all general requirements for all entities – including counties and CBOs – which receive federal grants: administrative rules, cost principles and Single Audit requirements. Those new rules go into effect after Christmas, 2014. All persons and agencies who deal with federal grants will need to be aware of and prepared for the coming changes. In addition to the specifics of the Supercircular, the class will cover:

- ♦ *Administrative rules:* when approval is needed for budget changes; the responsibility for equipment remaining when the grant ends, etc.
- ♦ *Cost principles:* criteria for allowability; documentation requirements for salaries and wages, etc.
- ♦ *Single Audit requirements:* changes in the threshold for Single Audits and the required attributes of an audit finding



Course eligible for CPE credits for Certified Public Accountants.

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

Thursday, January 14, 2016 9:30 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Analysts

Overview for decision-makers, elected officials and managers to understand and interpret county financial reports

County Financial Reporting and Budgeting for Nonfinancial Professionals 330

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’ 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. Participants explore an approach to use with budgets to identify assumptions they include.

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

Friday, March 18, 2016 10:00 a.m.–3:30 p.m.
Merced ♦ \$129/person for counties ♦ 3 credits ♦ Managers/executives

Friday, May 13, 2016 10:00 a.m.–3:30 p.m.
San Diego ♦ \$129/person for counties ♦ 3 credits ♦ Managers/executives

EMERGING ISSUES



A series of courses exploring trends in long-term policy issues

These unique classes provide county decision-makers with an opportunity to explore emerging trends and issues with colleagues and experts in the field. Brief presentations examine various facets of the issue and allow ample opportunity for policy-level discussions. The conversations look at interrelationships amongst the facets along with the resources, capacity and authority available for counties to work toward solutions. Options are discussed along with opportunities and barriers, and the types and consequences to policy decisions counties may need to address for sustainable solutions.

Emerging Issues #4

Homelessness in Our Communities 404

Homelessness has proven to be an enduring and complex modern problem which crosses many disciplines, populations, and boundaries. Homelessness does not respect political boundaries in counties and cities, and responsibilities cross and intersect with many county and city departments, and even state and federal agencies, such as the VA. Within counties, the issue intersects with the public safety, social services, public health, behavioral health, even the public works department. Yet a number of counties are taking on homelessness through a variety of collaborative approaches – both in policy and practice. This class will engage participants to explore many facets of homelessness, from decriminalization to treatment of root causes to prevention, and how counties are thinking about policies and collaborative programs to address it. Several case studies will be examined.

Facilitators: Kern County Supervisor Leticia Perez and Sacramento County Supervisor Phil Serna.

Thursday, April 14, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

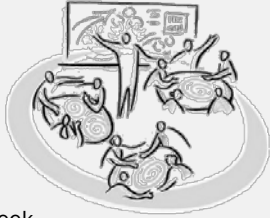
SPECIAL TWO-DAY INTENSIVE WORKSHOP

Hands-on practices to facilitate internal & community meetings

Facilitation Skills: The Basics of Bringing People Together 377

NEW UPDATED AND EXPANDED WORKSHOP

How many times have you found yourself trying to bring parties together to find common ground on an agreement, policy or study? 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. Come prepared to try your hand at group facilitation!



Instructors: Bill Chiat is Dean of the CSAC Institute; Angela Antenore is president of Antenore and Associates. Both have conducted hundreds of facilitations from governing body strategy sessions to intergovernmental problem-solving groups.

Thursday-Friday, June 23-24, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$259/person for counties ♦ 6 credits ♦ Managers

Why change efforts fail - and how to remove those barriers

Leadership & Change:

Practices to Move Organizations

124

Elected officials and managers alike 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; recognizing barriers; and creating an environment in which people can expand their capacity to address adaptive change.



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

Thursday, January 21, 2016 10:00 a.m.–3:30 p.m.
 Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, June 10, 2016 10:00 a.m.–3:30 p.m.
 San Diego ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, June 17, 2016 10:00 a.m.–3:30 p.m.
 Merced ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

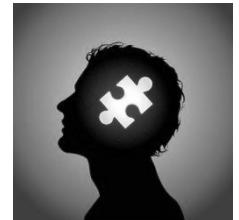
Create customer satisfaction in a county setting

Leading with Emotional Intelligence

128



Every organization has individuals who consistently outshine others. What are the characteristics and practices that distinguish the great or top 10% performers from the good performers? What evidence based practices should be part of your daily routine to be a high performer? We will answer these questions from over a 30 year data base 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 and create a direct report. Hands on tools to enhance your EI will be explained and practiced. Emotional Intelligence has been researched to be the prime factor contributed to top 10% performance and one's success when compared to Intelligence Quotient (IQ) and technical expertise. Business simulations, practices sessions, videos and group discussions will help participants enjoy, engage and learn more.



Instructor: Rely Nadler, Psy.D. is founder of True North Leadership, Inc. A licensed psychologist and master certified coach (MCC), Dr. Nadler has been a leader in developing EI tools for executives and leaders since 2001, and author of *Leading with Emotional intelligence*.

Friday, April 22, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

The context of county-state revenue relationships

Financing California Counties: A History of Revenue Sources

151



Have you found yourself overwhelmed trying to understand the county revenue sources and funding stream? And how we ended up with this complex system? This course provides an in-depth examination of county revenue sources and how they have evolved. Exploring the context of county funding decisions by Legislative and the 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. You'll leave with a clearer appreciation and understanding of county revenues.

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

Thursday, January 28, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/executives

Friday, March 11, 2016 10:00 a.m.–3:30 p.m.
 San Diego ♦ \$129/person for counties ♦ 3 credits ♦ Managers/executives

Create customer satisfaction in a county setting

**Leveraging Customer Relationships:
Balancing Satisfaction with Priorities** 354

This policy level course will help county managers and elected officials explore ways to create and enhance a customer service culture in their organization. Participants will explore how to balance good customer service with county and state regulations and requirements. The conversation will focus on what defines good customer service and a service culture. Lively small and large group discussions will give you tools to assess where you are, what the gaps are to be more service oriented, and how to get there. Participants discuss the elements of structure and process which support and recognize effective customer service, even in difficult regulatory situations. You will be able to network and brainstorm with your peers as well as learn practical strategies. Barriers to good customer service are examined along with service and performance measurements.

Instructors: Dr. Marilyn Manning, CEO, The Consulting Team, LLC, has consulted on customer service, strategic planning, communications and cultural changes with multiple local governments; and Liz Kniss, Palo Alto City Council Member and former Santa Clara County Supervisor.

Friday, February 19, 2016 10:00 a.m.–3:30 p.m.
Merced ♦ \$129/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: Dr. Laree Kiely is president of the Kiely Group, organizational effectiveness consultants, and a professor at the USC Marshall School of Business.

Thursday, May 19, 2016 10:00 a.m.–3:30 p.m.
Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected officials

The 211 on Social Media 101 to Avoid a Communications 911

**Mastering Social Media Basics
for Effective County Outreach** 353

Confused about social media, which platforms are right for your county, how to find time to manage it, and what to post? In this high-energy, fast-moving workshop, former Sacramento County communicator-turned-social-media-specialist Kerry Shearer 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! He'll give you updates on which social media sites to focus on and upcoming platforms to watch,

while giving you concrete tips, tools, apps, and hands-on interaction in an engaging way that will help you become a social media Ninja (*or at least have a lot more confidence!*). Kerry's background as a public information officer,



broadcaster, and social media guru means that he can help even those who don't consider themselves to be social media- or tech-savvy to come away from the workshop with newly developed knowledge, skills and techniques to begin implementing immediately! This workshop will be valuable whether you're a social media newbie or a seasoned practitioner. (**Note:** Please bring your smartphone or tablet, fully charged).

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

Thursday, January 21, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Achieve outcomes in everyone's best interest

**Negotiations and Collaboration
in Complex Environments** 356



Negotiation is “a back and forth interaction among two or more people who wish to arrive at a mutually agreeable outcome where the parties have some interests in common and some that are opposed.” This definition from Fisher and Ury's book *Getting to Yes* describes most “Public Good” negotiations. Solution-Based Negotiation teaches participants how to achieve the most beneficial outcomes for all negotiating parties while ensuring the outcomes are in the best interest of the public while the negotiating parties' relationships end positively. This course covers the most current tried and tested behaviors in the field of negotiation and gives you tools that will be immediately useful in your work. Best of all, it can help you serve your constituents in the best possible ways without needless compromise.

Instructor: Dr. Laree Kiely is president of the Kiely Group, and professor at the USC Marshall School of Business.

Friday, January 15, 2016 10:00 a.m.–3:30 p.m.
Merced ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Friday, April 29, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Thursday, June 16, 2016 10:00 a.m.–3:30 p.m.
Martinez ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Negotiation practices in difficult situations and with difficult people

Advanced Practices in Negotiations 384

This advanced course is designed to enhance and deepen the skills of those with negotiations experience. Whether applied in labor relations, conflict resolution, contracts, intergovernmental agreements and hundreds of other situations – this advanced course takes your negotiation practices to the next level. The class focuses on understanding and applying the 21st century framework for negotiation success even in very difficult situations and with very difficult people. Participants will explore and apply

tools in typical negotiation challenges including scarce resources, rigid timeframes, emotionally charged issues, power struggles and multiple negotiators. Practical strategies and tools for difficult people and complex situations will highlight the class discussions. Participants will have hands-on experience with advanced tools and how to develop their “going forward” plan in a variety of situations.

Instructor: Laree Kiely, Ph.D. is president of the Kiely Group and professor at the USC Marshall School of Business.

Friday, June 3, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Don't let crises chaos take control of your organization

Optimizing Effectiveness: Managing Crises within Organizations 390

Unexpected events occur frequently in organizations. Whether a change in management, change in structure, budget cut, new technology or other emergency ... organizations can quickly evolve into chaos. This course offers managers the basics in identifying, preventing and controlling organizational crisis situations. It examines crisis management basics, from preparation and identifying symptoms to understanding the stages of a crisis and appropriate leadership practices to employ to optimize through the crises. The importance of communication and making effective decisions is covered, as are a variety of typical organizational scenarios and options for responses. The course concludes with guidance on damage control and stakeholder relations, restoration of confidence in an agency or management team, and strategies to prevent and to respond quickly to organizational crises.

Instructor: Bill Chiat is Dean of the CSAC Institute and an expert in organizational development.

Friday, March 18, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

For experienced presenters wanting to up their presentations

Polish Your Presentation: Advanced Practices in Communication 125



This intensive course 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.

Friday, February 19, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials



It's getting tougher to fill key positions – How do you compete?

Beyond the Brochure: Recruiting & Hiring Senior Executives 359

How do counties attract and hire the best senior staff? This course is designed for county supervisors, senior managers and human resource staff responsible for recruiting senior executives such as the CAO, county counsel and department directors. You can use a recruiter, but still how do you know it's the best person for the job? The class examines innovations and practices to prepare for the recruitment, market the position, determine cultural and community fit; assess skills; questions to ask in interviews, and how to go beyond references.

Instructor: Pamela Derby, Executive Recruiter, CPS HR Consulting, a self-supporting public agency.

Friday, March 4, 2016 2:00 – 5:00 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ All staff/elected officials

Improve customer satisfaction, employee performance and reduce costs

Service Excellence through Process Improvement: Championship 374

When counties look to create efficiencies, process improvement is a valuable tool. It can help maximize value, reduce wasteful activities, and improve service delivery. Hear case examples of how Ventura County has significantly improved service quality and performance while reducing costs. This hands-on course engages managers in techniques to identify current service delivery processes and find opportunities to improve. Tools are shared for both identifying process problems and engaging the process participants in crafting solutions. Participants apply the tools in simulations and explore how to use them in a process improvement opportunity at home. Objectives include: 1) identify what a process is and define process improvement; 2) understand and apply the plan-do-check-act cycle; 3) know how and when to apply various improvement tools; and 4) create an improvement plan for a selected process.

Instructor: Paul Stamper is manager of the Ventura County Service Excellence Program.

Thursday, May 12, 2016 10:00 a.m.–3:30 p.m.
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/staff

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 for state and local finances and has worked in both the executive and legislative branches on the budget; Jean Hurst is Principal with HBE Advocacy and a long-time legislative advocate on local government finance.

Friday, April 15, 2016 10:00 a.m.–3:30 p.m.
 Merced • \$129/person for counties • 3 credits • Staff/Elected Officials

Thursday, May 19, 2016 10:00 a.m.–3:30 p.m.
 Sacramento • \$129/person for counties • 3 credits • Staff/Elected Officials

Build organizational capacity from within the county

Talent Development and Succession Planning 380



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.

Instructors: 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.

Friday, January 8, 2016 10:00 a.m.–3:30 p.m.
 San Diego • \$129/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

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 (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.

Friday, February 26, 2016 10:00 a.m.–3:30 p.m.
 Sacramento • \$129/person for counties • 3 credits • Staff/Elected Officials

Prepare for organizational scandals and crises

When Bad Things Happen: Managing Crises and Emergencies 357

Counties are prepared for natural disasters ... but what about 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.

Friday, February 12, 2016 10:00 a.m.–3:30 p.m.
 San Diego • \$129/person for counties • 3 credits • Staff/Elected Officials

Friday, May 20, 2016 10:00 a.m.–3:30 p.m.
 Merced • \$129/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.

Thursday, May 26, 2016 10:00 a.m.–3:30 p.m.
 Sacramento • \$129/person for counties • 3 credits • Staff/Managers

CSAC Institute Executive Credential for Technology Managers and Directors



CSAC Institute and the California County Information Services Directors Association have partnered together to offer a new **California County Technology Executive Credential**.

The Credential provides an opportunity for managers and executives in county technology to expand their professional development both in IT and leadership practices. The Technology Credential requires completion of five IT courses and five leadership courses. Participants can register for individual classes or for the credential package. For detailed information and registration for the County Technology Credential, including a list of courses, please visit: www.ccisda.org.

Technology courses are open to all county staff. Registration in the credential is not required. Classes may be registered for individually at the CSAC Institute website: www.csacinstitute.org.

Create better value for – and relationships with – IT customers

IT Performance Metrics and Customer Value Management 342

Country governments create value for citizens through the services they deliver. Doing so effectively and efficiently not only requires a keen understanding of how government service quality is impacted by the internal systems and processes which enable them, but also requires establishing metrics around these systems and processes in order to measure performance – after all if it isn't measured, it isn't managed. This facilitative course is designed to help county IT professionals understand the metrics that matter. By taking a customer-centric approach, participants will understand how to establish metrics across IT services, applications, and infrastructure, optimize performance over time, and communicate the benefits realized to the rest of the organization through a series of interactive discussions, group activities, and individual exercises.

Thursday, February 4, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Managers

Gather the right information to design the right systems

IT Business Analysis 340

In today's world, technology drives organizational innovation. For county leaders this new reality means constantly finding innovative ways technology can advance their interests. County IT leaders must proactively create IT services that enable this innovation. This capability starts with effective requirements gathering, and is further enabled by high-quality project management programs and processes that focus on tracing business needs from initial request to final output to ensure nothing is lost in translation. This facilitative course is designed to equip county IT leaders with the knowledge



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and skills necessary to optimize requirements gathering in a way that drives the most organizational value. Participants will also have access to provide practical tools and templates that help to automate IT's requirements gathering and project management activities, ensuring projects that deliver on expectations and avoid unnecessary rework.

Thursday, April 7, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Managers

How is IT service delivery positioned in your county? On the mark?

IT Service Management 341

IT exists in large measure to support other parts of the county—our internal customers. However, many IT departments do not approach IT delivery through a customer-service lens. Instead they focus on maintaining performance levels and reacting to requests. As cloud services proliferate, county leaders have more options available to procure IT services. By taking an "order taker" posture in this dynamic, IT functions risk being outsourced altogether, compromising the unique value they can provide the organization. This course will enable county IT leaders to properly position themselves against these external options, by helping them identify their current level of IT customer-service sophistication, and instilling the knowledge, tools, and templates required to institute a proactive IT service management operation.

Thursday, June 9, 2016 10:00 a.m.–3:30 p.m.
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Managers



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**Continuous learning
for county officials and staff**

Visit www.csacinstitute.org
for class schedules and registration

2016 Course Schedule Index Institute Courses by Topic

COURSE		PAGE
LEADERSHIP COURSES		
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389	Communicating and Presenting Complex Information	1
375	Coping with Ambiguity	2
377	<i>Special Workshop:</i> Facilitation Practices for Managers	3
124	Leadership and Change: Practices to Move Organizations	3
128	Leading with Emotional Intelligence	3
354	Leveraging Customer Relationships	4
360	Managing Conflict (even hostility) in Comfort	4
356	Negotiations and Collaboration in Complex Environments	4
384	Advanced Practices in Negotiations	4
390	Optimizing Effectiveness: Managing Organizational Crises	5
125	Polishing the Presentations: Advanced Practices in Communication	5
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POLICY & GOVERNANCE COURSES		
368	Cost Principles and the Supercircular: Federal Grants	2
330	County Financial Reporting for Nonfinancial Professionals	2
404	<i>Emerging Issues:</i> Homelessness in Our Communities	2
151	Financing California Counties: A History of Revenue Sources	3
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353	Mastering Social Media Basics for Effective County Outreach	4
359	Recruiting and Hiring Senior Executives	5
396	State Budget 101: What Counties Need to Know	5
380	Talent Development and Succession Planning	6
365	Unraveling County Pensions and Retirement Benefits	6
357	When Bad Things Happen: Managing Media in Crises	6
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COST-EFFECTIVE SOLUTION FOR COUNTY ELECTED OFFICIALS AND SENIOR STAFF PROFESSIONAL DEVELOPMENT

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

Course schedule and descriptions subject to change.
Visit www.csacinstitute.org for:

- * Up-to-date schedule and course information
- * Special class and workshop additions
- * Institute Credential Programs
- * Institute Fellows
- * Tuition discounts and scholarships



ABOUT CSAC Institute

CSAC Institute for Excellence in County Government is a professional, practical continuing education program for county staff and 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 is a program of the California State Association of Counties (CSAC) and established in 2008. Over 3,600 county staff and elected officials have taken courses. The Institute is supported by CSAC, the California Counties Foundation (a 501(c)(3) charity), grants from organizations and foundations, and course registration fees.

Course Locations

Sacramento – Courses are held in downtown Sacramento at the Sacramento Masonic Temple (1123 J Street).

San Diego – Courses are hosted by the County of San Diego and held at the County Operations Center (Overland Avenue and Claremont Mesa Boulevard) in San Diego.

Merced – Courses are hosted by the County of Merced and held at the Child Support Services training room (3368 North Highway 59) in Merced.

Martinez – Courses are hosted by the County of Contra Costa and held at the Department of Conservation and Development (30 Muir Road) in Martinez.

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. Please contact Institute Registrar with any registration questions or problems.

Fees – Course tuition includes instruction, materials, certificate and lunch (for 3-credit classes). All county staff and officials are eligible for the special county rate of \$43/credit. Staff from county-partnered CBOs, CSAC Corporate Associates and CSAC Affiliate Members are also eligible for this special registration rate. On a space-available basis, courses are open for others to attend. The regular registration fee is \$117/credit.

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 15% with these options.

The Institute is developing an additional package for counties to save on registration fees. Soon counties can purchase a bulk package of course registrations at a discount to distribute to staff. For more information please contact the Institute Dean.

Contact Us

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 916/327-7500

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