

# Winter-Spring 2017 Course Guide

*The noblest pleasure is the joy of understanding. – Leonardo da Vinci*

## Professional development classes for county officials, executives and managers

### Schedule at a Glance

DATE		LOCATION	PAGE
<b>JANUARY</b>			
12 (TH)	Effective Use of Social Media	Sacramento	3
13 (F)	Manage Conflict (even hostility) in Comfort	Riverside	5
19 (TH)	Leadership & Change: Practices to Move Organizations	Contra Costa	5
20 (F)	Local Governance in California: All those agencies!	Merced	5
26 (TH)	<i>Emerging Issues</i> : The Sharing Economy	Sacramento	3
27 (F)	Financing California Counties: The History	Sacramento	3
<b>FEBRUARY</b>			
2 (TH)	IT Performance Metrics & Customer Value Management	Sacramento	4
3 (F)	The Art & Practice of Organizational Leadership	Sacramento	1
10 (F)	Customer Service in the Public Sector	Riverside	2
16 (TH)	Realignment 301: Public Safety Funding and Programs	Sacramento	6
16 (TH)	Intergenerational Leadership	Contra Costa	4
17 (F)	State Budget 101: What Counties Need to Know	Merced	6
23 (TH)	Ins and Outs of Monitoring Federal Grant Recipients	Sacramento	4
<b>MARCH</b>			
2 (TH)	Negotiation and Collaboration in Complex Environments	Sacramento	6
3 (F)	Advanced Practices in Negotiations	Sacramento	6
9 (TH)	GASB Financial Reporting Requirements	Sacramento	3
10 (F)	Storytelling and Other Practices in the Art of Persuasion	Riverside	7
16 (TH)	Labor Relations and Negotiations	Contra Costa	5
17 (F)	Financial Reporting for Nonfinancial Professionals	Merced	2
23 (TH)	Leading with Emotional Intelligence	Sacramento	5
24 (F)	Supporting the Next Generation: Collaboration for Youth	Sacramento	7
<b>APRIL</b>			
6 (TH)	IT Business Innovation	Sacramento	4
7 (F)	Storytelling and Other Practices in the Art of Persuasion	Sacramento	7
7 (F)	Building and Maintaining a Team Environment	Riverside	1
20 (TH)	Manage Conflict (even hostility) in Comfort	Contra Costa	5
21 (F)	Intergenerational Leadership	Merced	4
27 (TH)	Financial Management: Debt and Investment	Sacramento	3
28 (F)	Cost Principles, Reporting ... and the Supercircular	Sacramento	2
<b>MAY</b>			
4 (TH)	Customer Service in the Public Sector	Sacramento	2
5 (F)	Talent Development and Succession Planning	Riverside	7
11 (TH)	When Bad Things Happen: Managing the Media	Sacramento	7
12 (F)	Leadership During and After Crises – Roles of Officials	Sacramento	2
18 (TH)	Crafting and Implementing Effective Strategic Plans	Contra Costa	2
19 (F)	Stakeholder Engagement: Does it Have to Be Messy?	Sacramento	6
19 (F)	Leadership & Change: Practices to Move Organizations	Merced	5
<b>JUNE</b>			
1 (TH)	IT Service Management	Sacramento	4
2 (F)	Building and Maintaining a Team Environment	Sacramento	1
8 (TH)	World Class Contracting and Procurement	Sacramento	7
9 (F)	Leading with Emotional Intelligence	Riverside	5
15 (TH)	Effective Use of Social Media	Contra Costa	3
16 (F)	Negotiation and Collaboration in Complex Environments	Merced	6
22 (TH)	Local Governance in California: All those agencies!	Sacramento	5

*Nature and dimensions of leadership in effective organizations*

### The 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.

**Friday, February 3, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

*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. 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 CSU, Sacramento.

**Friday, April 7, 2017** 10:00 a.m.–3:30 p.m.  
Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

**Friday, June 2, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives



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, and more
- ◆ *Cost principles:* criteria for allowability, and more
- ◆ *Single Audit requirements:* required attributes of an audit finding and more

Course eligible for CPE credits for Certified Public Accountants.

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

**Friday, April 28, 2017** 9:30 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Managers/Execs

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' 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, March 17, 2017** 10:00 a.m.–3:30 p.m.  
 Merced ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

Make strategic planning mean something

## Crafting and Implementing Effective Strategic Plans 123

Most counties and county departments create strategic plans. Sometimes they provide clear guidance to decision makers and staff; sometimes they don't. This course examines how to make the plan a living document ... and have it mean something to those affected. Participants examine: 1) how to craft a strategic plan with the Board of Supervisors or other governing board; 2) engagement of the

community and staff in the process; 3) tips to prepare an actionable plan; 4) communication of the plan; and 5) putting a plan into action. Best practices and case examples are used to explore integration of the plan into the operations and decision-making of the organization. Discussion highlights tips for structuring an effective strategic workshop, including selection of a facilitator, participants and preparation.

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

**Thursday, May 18, 2017** 10:00 a.m.–3:30 p.m.  
 Contra Costa ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

Lead your community and organization through crisis and recovery

## Leadership During and After a Crisis – Roles of Elected and Senior Officials 398



During a crisis all eyes look to community leaders for information, guidance, action and hope. Suddenly senior executives and elected officials find themselves in the spotlight being asked tough questions about a topic they may not fully understand, and as community members, they may be survivors as well as leaders. This course is designed to help elected officials and senior executives understand their role as leaders during the response and through the long process of recovery. From a high level the course will look at how the pieces of emergency management fit together and then dig into what leaders should be doing and how they can contribute value towards resolving the crisis. The course will offer practical ideas and insights. Examples and case studies from real events such as San Bernardino and other communities will set the stage for candid discussions about what works, what doesn't, and how to help without hindering. Once the smoke clears and the responders go home the community needs leaders that were an integral part of the resolution to lead the way back to 'normal.'

Instructor: Rob Dudgeon is the former deputy director of the City & County of San Francisco Department of Emergency Management and now a global consultant on leadership in crisis situations.

**Friday, May 12, 2017\*** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

\* Also see "When Bad Things Happen – Media in Crises" on Thursday, May 11

Create customer satisfaction in a county setting

## Customer Service in the Public Sector: 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.

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

**Friday, February 10, 2017** 10:00 a.m.–3:30 p.m.  
Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

**Thursday, May 4, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

*The 211 on social media 101 to avoid a communication 911*

## Effective Use of Social Media and Electronic Communications 353



Confused about social media, which platforms are right for you, how to find time to manage it, what to post? This fast-moving workshop 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 get updates on current popular social media sites and upcoming platforms to watch, along with concrete tips, tools, apps and hands-on interaction that will help you become a social media Ninja (or at least have a lot more confidence!). Even those who don't consider themselves to be social media- or tech-savvy will come away with newly developed knowledge, skills and techniques to begin implementing immediately. This will be valuable whether you're a social media newbie or a seasoned practitioner.

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

**Thursday, January 12, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Thursday, June 15, 2017** 10:00 a.m.–3:30 p.m.  
Contra Costa ♦ \$129/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: Experts from the CSAC Finance Corporation.

**Thursday, April 27, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

## EMERGING ISSUES

*A series of courses exploring trends in long-term 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 ample opportunity for discussions on the resources, capacity and authority available for counties to work toward solutions.

*Policy and governance in the emerging era of shared economies*

### Emerging Issues: The Sharing Economy 405

The sharing economy is breaking the mold for the way goods and services are provided by private companies in our state. In doing so, it's challenging existing models for county business licenses, tax collection, land use designation, and other county ordinances seeking to protect public health and safety. This session will review how vehicle, residential units, office space, and other shared economy services are helping or hurting the bottom line. Case studies will be offered to illustrate how counties are tackling the problems and finding ways to make the shared economy work for their benefit in county service delivery.

**Thursday, January 26, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Elected Officials/Staff

*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. 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.

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

**Friday, January 27, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*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 your understanding of GASB 34, and provide an update of GASB-related pronouncements, 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.*

Instructor: Gary M. Caporicci, CPA CGFM is a senior partner and co-founder of Caporicci & Larson, Certified Public Accountants.

**Thursday, March 9, 2017** 9:30 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

*Today's county workforce has people in their 70's, in their teens and everywhere in between*

**Intergenerational Leadership** 129

For the first time in history we find ourselves working with people from five distinct 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, February 16, 2017** 10:00 a.m.–3:30 p.m.  
 Contra Costa ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

**Friday, April 21, 2017** 10:00 a.m.–3:30 p.m.  
 Merced ♦ \$129/person for counties ♦ 3 credits ♦ Managers/Executives

**Information Technology Courses for IT Managers and Directors**



CSAC Institute and the California County Information Services Directors Association have partnered together to offer a series of professional development courses for managers and executives in county technology. The courses are part of the requirements for the *California*

*County Technology Executive Credential*. For more information on the IT Credential, please visit: [www.ccisda.org](http://www.ccisda.org).

*Create better value for – and relationships with – IT customers*

**IT Performance Metrics & Customer Value Management** 342

County 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 2, 2017** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ IT Managers/Executives

*Enable organizational innovation with IT solutions customers want*

**IT-Led Business Innovation** 343

Innovation in public sector organizations is typically focused on cost reduction and internal service optimization, rather than driving top-line growth through disruptive technologies, as is the case in the private sector. In order for County IT departments – and CIOs – to take their position as innovation drivers, they must move beyond the effective delivery of core services and become true strategic partners; the business must look to IT for input on solving business problems and driving the organization forward. This course is designed to help County IT leaders to gain and manage the time, resources, and processes of innovation to use IT staff ideas and enable organizational innovation. They will learn to assess IT alignment with the organization, understand the innovation management process, gain and develop organizational diversity of experiences and idea exchange capabilities, and enable strategic resource allocation. Leaders will learn how to move from trusted IT operator to organizational innovator.

**Thursday, April 6, 2017** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ IT Managers/Executives

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

**IT Service Management** 343

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 1, 2017** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ IT Managers/Executives

*Build collaborative relationships with county contractors and CBOs*

**The Ins and Outs of Monitoring County Federal Grant Recipients** 397

**new** This course provides tools to assist counties which provide funding as a pass-through entity to various subrecipient nonprofit organizations. Participants will discuss the concepts of indirect costs vs. supporting services and program costs vs. direct costs as well as criteria to consider when reviewing financial statements in conjunction with program reports. Participants will also discuss the uses of performance measures and the effect of the Uniform Guidance on subrecipient monitoring. Participants should bring questions about nonprofit financial statements they have encountered as part of their review and

analysis of nonprofit financial statements. *Eligible for CPE credits for CPAs and MCLE credits for members of the bar.*

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

**Thursday, February 23, 2017** 9:30 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Managers/Analysts

*Employees are every county's largest budget item*

**Labor Relations and Negotiations** 153  
**in Local Government**

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, March 16, 2017** 10:00 a.m.–3:30 p.m.  
 Contra Costa ♦ \$129/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, January 19, 2017** 10:00 a.m.–3:30 p.m.  
 Contra Costa ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Friday, May 19, 2017** 10:00 a.m.–3:30 p.m.  
 Merced ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*Enhance interpersonal leadership skills*

**Leading with Emotional Intelligence** 128

What characteristics and practices distinguish great from good performers? What evidence based practices should be part of your daily routine to be a high performer? We will answer these questions from a 30 year 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. Hands on tools to enhance your EI will be explored.

Emotional Intelligence is a prime factor to one's success when compared to Intelligence Quotient (IQ) and technical expertise. Business simulations, practices sessions, videos and group discussions will help participants enjoy, engage and learn more.

**Instructor:** Relly Nadler, Psy.D. is founder of True North Leadership, Inc., and author of *Leading with Emotional intelligence.*

**Thursday, March 23, 2017** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Friday June 9, 2017** 10:00 a.m.–3:30 p.m.  
 Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*JPA-Special Districts-MPO-LAFCo-COG-Cities-CSA-MAC:  
 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, January 20, 2017** 10:00 a.m.–3:30 p.m.  
 Merced ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Thursday, June 22, 2017** 10:00 a.m.–3:30 p.m.  
 Sacramento ♦ \$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, a professor at the USC Marshall School of Business.

**Friday, January 13, 2017** 10:00 a.m.–3:30 p.m.  
 Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Thursday, April 20, 2017** 10:00 a.m.–3:30 p.m.  
 Contra Costa ♦ \$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.

**Thursday, March 2, 2017\*** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Friday, June 16, 2017** 10:00 a.m.–3:30 p.m.  
Merced ♦ \$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, March 3, 2017\*** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*\* Take these two top negotiations classes on back-to-back days!*

*Detailed overview of public safety realignment funding streams*

## Realignment 301: Public Safety Funds and Realignment Funding 307b

This course covers in-depth the law enforcement accounts from the 2011 realignment. It includes a review of: statutory changes; actual revenue results; the “base” calculations for each account; how base and growth



amounts are distributed to each state level account; how amounts are distributed to counties; and the formulas and the data behind the formulas. Important lessons about the dynamics of realignment from Health and Social Services Realignment 1991 and 2011 are shared. Tools are introduced to project and track county revenues and examine what county staff should consider when budgeting for these accounts in the coming years. The course includes discussions on the risks and opportunities of realignment for law enforcement and the strategic investments counties have undertaken. Participants examine what’s next, including possible legislative changes to realignment.

Instructors: Dorothy Thrush, Public Safety Group Finance Director, San Diego County and Elizabeth Howard Espinosa, Partner, HBE Advocacy.

**Thursday, February 16, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*How to create complex decision-making processes that work*

## Stakeholder Engagement: Does it always have to be so messy? 372

Most of us have experienced decision-making as a single-step process—just do it! There is much more to effective problem solving and decision-making. In this best practice course you'll learn how to design and lead effective decision-making processes with multiple



stakeholder groups. Participants explore tips and best practices – and the messy traps to avoid. This is a key, but elusive, skill necessary for all managers in today's fast-moving environment. It reveals both the fundamental systems at work in high-performing organizations, as well as the specific day-to-day things leaders can do to sustain high levels of success for themselves and their organizations.

Instructor: Eric Douglas is an author, entrepreneur and facilitator who's designed and led stakeholder processes in many sectors, including water, health care, energy, and public safety.

**Friday, May 19, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*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 long-time legislative advocate on local government finance.

**Friday, February 17, 2017** 10:00 a.m.–3:30 p.m.  
Merced ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*Storytelling is one of life's most powerful skills*

## Storytelling and Other Leadership Practices in the Art of Persuasion

378



Persuasion has been identified 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 activities the class explores elements of story-telling 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, March 10, 2017** 10:00 a.m.–3:30 p.m.  
Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

**Friday, April 7, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*Innovations in creating and funding youth development programs*

## Supporting the Next Generation – Collaborative Approaches and Funding to Support Youth

321

**new**

This course will address the pressing challenges facing counties related to low-income youth and their families. County leaders will learn from their peers about a range of funding, programmatic solutions and partnerships in the following areas: advancing youth health, development and workforce-readiness; crime and truancy prevention; supporting the needs of homeless and foster youth; and developing sustainable funding streams to support youth. Strategies will be shared to: assess and prioritize the most pressing issues concerning low-income youth and their families; identify collaborative opportunities that leverage existing community resources to advance the well being of youth; identify policy options to address high priority issues; steps and strategies to establishing a successful children's fund; and applying lessons learned from other counties.

Instructors: County Supervisors and experts from the Institute for Local Government.

**Friday, March 24, 2017** 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, May 5, 2017** 10:00 a.m.–3:30 p.m.  
Riverside ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

*Prepare for organizational scandals and crises*

## When Bad Things Happen: Managing the Media in 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 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, May 11, 2017\*** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

\* Also see "Leadership in Crises" on Friday, May 12

*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, June 8, 2017** 10:00 a.m.–3:30 p.m.  
Sacramento ♦ \$129/person for counties ♦ 3 credits ♦ Staff/Elected Officials

## COURSE SCHEDULE INDEX

### Institute Courses by Topic

COURSE	LEADERSHIP COURSES	PAGE
120	Art & Practice of Organizational Leadership	1
123	Crafting and Implementing Effective Strategic Plans	2
124	Leadership and Change: Practices to Move Organizations	5
128	Leading with Emotional Intelligence	5
129	Intergenerational Leadership	4
371	Building and Maintaining a Team Environment	1
354	Customer Service in the Public Sector	2
356	Negotiations and Collaboration in Complex Environments	6
384	Advanced Practices in Negotiations	6
360	Manage Conflict (even hostility) in Comfort	5
372	Stakeholder Engagement: Does it Have to Be So Messy?	6
378	Storytelling and Other Leadership Practices in the Art of Persuasion	7
380	Talent Development and Succession Planning	7
398	Leadership During and After a Crisis: Roles for County Officials	3
COURSE	POLICY & GOVERNANCE COURSES	PAGE
117	Financial Management: Debt and Investment of Public Funds	3
150	Local Governance in California: All those local agencies!	5
151	Financing California Counties: The History	3
153	Labor Relations and Negotiations in Local Government	5
307b	Realignment 301: Public Safety Funds and Funding	6
321	Supporting the Next Generation: Collaboration for Youth	7
353	Effective Use of Social Media and Electronic Communications	3
357	When Bad Things Happen: Managing the Media in Crises	7
364	GASB Financial Reporting Requirements	3
368	Cost Principles, Reporting Requirements ... and the Supercircular	2
369	County Financial Reporting for Nonfinancial Professionals	2
341	IT Service Management	4
342	IT Performance Metrics and Customer Value Management	4
344	IT-Led Business Innovation	4
392	World Class Contracting, Contract Management and Procurement	7
396	State Budget 101: What Counties Need to Know	6
405	<i>Emerging Issues: Sharing Economy</i>	3



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 part of the California Counties Foundation, Inc. and the California State Association of Counties (CSAC). Over 4,000 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).

**Riverside** – Courses are hosted by the County of Riverside and held at the Riverside County Innovation Center (3450 14<sup>th</sup> Street) in downtown Riverside.

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

**Contra Costa** – 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](http://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 \$129/class. Staff from county-partnered CBOs, CSAC Partners and Premier Members, and CSAC Affiliate Members are also eligible for this special registration rate. On a space-available basis, courses are open for others to attend. Regular registration fee is \$351/class.

**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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**Institute Training Program Coordinator** – Chastity Benson [cbenson@csacinstitute.org](mailto:cbenson@csacinstitute.org)

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.



### 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](http://www.csacinstitute.org) for:

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

