

ENROLLMENT FORM

FAX: 760-643-1761 ♦ **PHONE:** 800-457-0237 or 760-643-1760

PO Box 769 ♦ Bonsall, CA 92003-0769

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(A) _____ \$295 Brown Act & Conflict of Interest Laws Workshop

(B) _____ \$545 Special District Governance Seminar (Two Days)

(C) _____ \$745 Seminar + Workshop (\$95 savings)

(D) _____ \$119 Order Handbook Only - Brown Act & Conflict of Interest Laws

(E) _____ \$199 Order Handbook Only - Special District Governance Seminar

(F) _____ \$279 Order Handbook Only - Seminar + Workshop

(Handbooks will be shipped the week after the event)

(G) _____ \$ 50 Guest Meal Package for Workshop

(H) _____ \$100 Guest Meal Package for Seminar

• **10% Discount for attendance for 3 or more from same District**

• **\$25.00 Early registration discount (must receive payment by 1/11/01)**

Sub Total of Registration \$ _____

Subtract 10% Discount for 3 or more \$ _____ *(if applicable)*

Subtract \$25.00 Early Registration \$ _____ *(if applicable)*

Certification Fee (\$35.00) \$ _____ *(if applicable)*

Total Registration Fee \$ _____

METHOD OF PAYMENT: Payable to Special District Institute

Check Enclosed for \$ _____

Please Invoice PO# _____

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Signature _____ Expiration Date: _____



PO Box 769
Bonsall, CA 92003-0769



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SPECIAL DISTRICT GOVERNANCE

USING PROVEN TECHNIQUES
TO BECOME THE BEST LEADERS

For Board Members, Managers, Secretaries, and Senior Staff
of Special Districts, Cities, Counties, and Non-Profits

A Special District Institute Seminar

- The best seminar on district governance
- Completely updated — an eye-opening educational experience
- Addresses your needs in today's technological and political environment
- Learn how to handle controversial Board Members and difficult constituents



*Revised
and
Updated*

This is the first in a series of three seminars designed to give you the tools needed to deal with the challenges facing your district. This seminar incorporates learning and discussion on the latest techniques and technology for effective district governance.

A Must Attend Seminar For Newly Elected Officials



*Seminar #1
in the Certificate
Program in Special
District Leadership
and Management*

Embassy Suites
Monterey, CA
February 22-23, 2001

Accompanying Workshop offered February 24th:

WORKSHOP ON THE BROWN ACT &
CONFLICT OF INTEREST LAWS

Special District Governance

The only program of its kind anywhere...

If you want to manage your district successfully, attend this unique seminar. It provides the information special district board members, management, and staff need to be distinctive leaders. New directors will understand better what their responsibilities are for the district. Experienced directors will update and expand their knowledge. Management, staff, and all directors will network with others and gain new insights.

THIS PROGRAM IS DEVOTED SOLELY TO SPECIAL DISTRICT NEEDS. The emphasis is on practical and useful information, which you can take away with you and put to work immediately. Special consideration is given to the law and how it affects you as special district leaders.

Optional Workshop - Saturday, Feb. 24th

Brown Act & Conflict of Interest Laws

Janet Morningstar, McCormick, Kidman & Behren
and Dean Derleth, Best, Best and Krieger

WHO SHOULD ATTEND...

This is a must attend workshop if you are a board member, manager, board secretary, or other management staff responsible for making decisions for your agency. In a single day, you will learn the latest changes in the Brown Act and Conflict of Interest laws affecting you and your agency. In addition, an update will be provided on the California Public Records Act.

WHAT YOU'LL LEARN...

- Roles of board members, managers, and legal counsel
- Determine what is and what is not a public record
- Procedures for adjourned, committee, and special meetings
- Rules for closed sessions, recording meetings, and preparing agendas
- What your liability is as a public official
- How to live within the laws governing your agency
- How to spot conflicts of interest

PROGRAM SCHEDULE

Thursday, February 22 - Seminar Day 1

7:30 - 8:00 a.m.	Registration and Continental Breakfast
8:00 - 8:15	Introductions & Opening Remarks
8:15 - 9:15	Effective District Leadership
9:30 - 10:30	Asset Management and Control: Keys to Success
10:45 - 11:45	Workshop 1 - Financial Issues Workshop 2 - Legislative Process
12:00 - 1:30	Keynote Luncheon: New Legislature & Legislation Update
1:45 - 2:45	Special Districts for the 21st Century
3:00 - 4:00	Planning for Your District's Future
4:15 - 5:30	Workshop 1 - Group Decision Making Workshop 2 - Internet Access
5:30 - 6:30	Networking Reception

Friday, February 23 - Seminar Day 2

8:30 - 9:00 a.m.	Continental Breakfast
9:00 - 10:00	Avoid Brown Act Problems
10:15 - 11:45	On the Right Side of Board & District Law
12:00 - 1:15	Luncheon: Presentation of Certificates
1:30 - 2:45	Build and Maintain Community Support
3:00 - 4:15	Workshop 1 - Press Relations Workshop 2 - Legal Issues
4:15 - 4:30	Wrap-up Session: Successful District Governance

Saturday, February 24 - Optional Workshop

8:00 - 5:00	Brown Act & Conflict of Interest Laws
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REGISTER NOW - 800-457-0237

Thousands have attended this valuable annual program over the past 30 years. All instructors are experienced and practicing authorities in the field of Special District Governance.

Experienced Faculty

Dean Derleth is a Partner in the Public Law Department of Best Best & Krieger, LLP's Riverside office. He represents municipal and public agencies in all aspects of general municipal and public agency law. He is General Counsel to the Rosamond Community Services District and the Crest Forest Fire Protection District, and the Assistant City Attorney for the Cities of Corona and Colton. Mr. Derleth graduated with distinction from the University of the Pacific, McGeorge School of Law and was elected to the Order of the Coif, an international academic honor association. He received his undergraduate degree in Economics from UC Irvine where he graduated cum laude.

Murray Joslin is Founding Director of The Transition Team, specializing in outsourcing and communication transitions. Mr. Joslin has consulted for the City of Irvine, and numerous Fortune 1000 firms, including McDonnell Douglas, J.C. Penney, Enova, and Bain and Company. Prior experience in industry includes management positions with Pitney Bowes and Eastman Kodak.

Gregg A. Lowry is a Principal and Co-Founder of Reiter Lowry Consultants. He is a registered civil and environmental engineer specializing in financial management models, project management, and maintenance and infrastructure planning and management. With almost three decades of experience, Mr. Lowry has held various management positions in the U.S. Navy and Southern California Special Districts. He has developed a widely used model for district application in planning, management, and facilities and equipment control.

Dr. Stephen Morgan is an Application Analyst in Government Financials for PeopleSoft. A director and past president of the San Ramon Valley Fire Protection District, Dr. Morgan is a recognized expert who has conducted extensive research in special district consolidations and privatization issues. Dr. Morgan is a lecturer at the University of Southern California and at California State University. In 1996, he received his Doctorate in Public Administration with an emphasis in Public Finance and Intergovernmental Relations. Dr. Morgan received his MA in Public Administration from California State Hayward and a BA in History from the University of California, Berkeley.

Janet Morningstar is a Partner in the firm of McCormick, Kidman & Behrens in Costa Mesa, specializing in public law, water law, and real estate matters. She is General Counsel for Rowland Water District and Associate General Counsel for Municipal Water District of Orange County. Ms. Morningstar has fifteen years experience in advising governing bodies of local agencies and special districts in such areas as the Ralph M. Brown Act, the Political Reform Act, the Public Records Act, and the California Environmental Quality Act. She earned her JD from the University of Southern California.

Martin Rauch is President of Rauch Communication Consultants. He has directed and implemented successful public involvement programs for many public agencies statewide. An expert on media, Mr. Rauch directs a team that produces dozens of newsletters, brochures, presentations, and bulletins every year for many district clients. He has been a trainer and speaker for several statewide associations and conferences.

Robert Rauch is a Principal Consultant for Rauch Communication Consultants. With over 150 special districts, local agencies, and other organizations as clients, Mr. Rauch is widely known throughout California. He specializes in planning and implementing focused public information programs, providing management consulting, and conducting strategic planning retreats. With over 30 years experience, Mr. Rauch was privileged to serve as a consultant to the White House and has spoken on management topics at numerous universities.

Glenn M. Reiter is a Principal in Reiter Lowry Consultants, a San Diego-based engineering, computer, and financial consulting firm, founded in 1981. He has over 35 years experience in local government and special districts. Mr. Reiter has been General Manager and Chief Engineer of a large southern California water district and a Director on the San Diego County Water Authority Board. He specializes in financial planning, the setting of rates and fees, including the financing of capital improvements. A co-founder of the California Special Districts Association and the Special District Institute, Mr. Reiter is a registered California civil and professional engineer and Life Member of the American Water Works Association and the National Association of Independent Financial Advisors.

Robert G. Walters is an Owner/Principal in the legislative advocacy firm of California Advocates, Inc. His practice focuses on governmental law, with an emphasis on legislative representation. Prior to his private practice, his governmental experience includes: Assistant to the Secretary of the California Human Relations Agency, Executive Officer to the California Board of Corrections, Deputy Director and Legal Counsel for the California State Office of Economic Opportunity, and Executive Assistant to the Majority Floor Leader of the California State Assembly. Robert has also served as President and a Trustee for the San Juan Unified School District. Mr. Walters holds a BA from the University of California at Los Angeles and received his JD from the San Francisco Law School.

Program Content

Effective District Leadership

Glenn M. Reiter, Reiter Lowry Consultants

- Keys to effective leadership
- Management and leadership styles
- The relationship of the district and the board to the public, employees, and other governments
- Deal with divergent issues and manage change
- Maintain your cool with disruptive board members

Asset Management and Control: Keys to Success

Gregg A. Lowry, Reiter Lowry Consultants

- You are a steward of assets
- The dangers of deferred maintenance
- How do you plan for your infrastructure needs?
- Three goals for effective asset management

Workshops - Case Studies

1. **Financial Issues** – fiduciary responsibilities and challenges. Presented by Glenn M. Reiter
2. **Legislative Process** – learn the roles of the agency and lobbyist, and how to use resources to influence legislation. Presented by Robert G. Walters

Special Districts for the 21st Century

Dr. Stephen Morgan, PeopleSoft

- Effective relationships of special districts with cities, counties, and other districts
- Advantages and disadvantages of reorganization via mergers, annexations, and/or consolidations
- The future of special districts

Planning for Your District's Future

Robert Rauch, Rauch Communication Consultants

- District mission and vision statements
- What your district will be like in 5-10 years
- Determine the priority issues of your district
- Develop a plan to address the issues - goals and objectives

Workshops - Case Studies

1. **Group Decision Making** – a dynamic session to improve group decision making. Presented by Murray Joslin
2. **Live Internet** – tap into a world of information available on the Internet: conduct research, search for legislation, and get new ideas. Presented by Dr. Stephen Morgan

Students and Guests Networking Reception

Avoid Brown Act Problems

Janet Morningstar, McCormick, Kidman, & Behrens

- Understand the intent and application of the Act
- Recent changes to the Act
- Practical aspects and highlights of the Act
- Recent court rulings

On the Right Side of Board and District Law

Dean Derleth, Best, Best, and Krieger

- What can and can't you do legally?
- Legally, where does the board stop and management begin?
- Do you know you are personally liable as a public official?
- Understand the powers of the board and of the district
- Avoid conflicts of interest and preserve the ethics of the office

Build and Maintain Community Support

Robert Rauch, Rauch Communication Consultants
Martin Rauch, Rauch Communication Consultants

- Successful public information policy and strategy
- Gain public support for controversial projects
- How to turn the tide when your district is under attack
- How to deal with vocal activist groups
- Guidelines for dealing with an adverse press

Workshops - Case Studies

1. **Press Relations** – develop practical strategies for working with the press. Presented by Robert and Martin Rauch
2. **Legal Issues** – deepen your understanding of the legal issues discussed earlier. Presented by Janet Morningstar and Dean Derleth

Wrap-up Session: Successful District Governance



One of the 3 Seminars Needed for Certification

Program and Registration Information

Embassy Suites, Monterey - Hotel Accommodations...

A special rate of **\$119 single/double** has been negotiated for two days before and after these events for reservations made by **February 7, 2001** (subject to availability). Make arrangements directly with the hotel: **831-393-1115** and refer to Special District Institute event for discounted rates. If you need complimentary shuttle service from Monterey Peninsula Airport, please notify the hotel when making lodging arrangements.

The Embassy Suites is located on the beautiful Monterey Peninsula just two blocks from the beach. The Embassy Suites offers comfortable meeting rooms, exquisite cuisine in restaurants with complimentary cooked-to-order breakfast and evening reception, complimentary fitness center with indoor swimming pool, whirlpool, and sauna, outdoor deck, full service business center, gift shop, and complimentary shuttle service to Monterey Peninsula Airport. All the rooms are suites and feature a separate living room, wet bar, microwave, coffee maker, refrigerator, dual line telephones with dataport and high speed T-1 Internet access, two remote control televisions with complimentary premium channels, Web TV, and Sony PlayStation, hairdryer, iron and full size ironing boards, and electronic locking doors.

Each Participant Receives...

Comprehensive handbook, all class materials, continental breakfast each day, refreshment breaks, lunch each day, networking with instructors and peers. Tuition does not include lodging or other meals.

Certification Program...

By attending this seminar, you are automatically enrolled as a candidate for the Certificate Program in Special District Leadership and Management. There is a \$35 administrative fee that will be charged with the enrollment of your third Seminar. Seminars can be taken in any order and must be completed within a three-year period.

Guest Meal Package...

Guests may join you for all meal functions provided a separate meal package is purchased in advance. Your guest will be given a name badge that will allow admittance to all meal functions.

Discounts Available...

Early Registration Discount...

You are entitled to a \$25 discount if we receive your registration and payment by January 11, 2001.

Team Discounts...

Attendance of groups of **three or more** from the same organization are entitled to a **10% discount**.

Multi-Event Discounts...

Attend the **Seminar** and the **Brown Act and Conflict of Interest Workshop** and **save \$95**.

Special Car Rental Discount...

Enterprise Rent-A-Car - special arrangements have been made for reduced car rentals. Call Enterprise at **800-700-1279** reference Special District Institute and **Code No. 23D0230**.

Avis Rent-A-Car - discounted rates are available. Call Avis at **800-331-1600** reference **Account No. D900923** and **Rate Code: Daily or Weekly - OO**.

Special Airline Discounts with...

United Airlines offers discounted airfares for this event. Call United **800-521-4041** to book your reservations and receive a 5% discount off the lowest applicable discount fare, including First Class, or a 10% discount off mid-week coach fares. An additional 5% discount will apply if tickets are purchased at least 60 days in advance of travel date. Use **Meeting ID No. 594PJ**.

Southwest Airlines is offering a 10% discount on most of its already low fares, for travel to and from this event. Call the Southwest Airlines Group and Meeting Reservations at **800-433-5368**. Reservations must be made at least 5 days prior to travel. Discounts are subject to terms and availability. Use **Meeting ID No. C7049**.

Cancellations and Refunds...

Tuition is fully refundable if written cancellation is received on or before January 2, 2001. Cancellations received in writing after January 2, 2001 but prior to February 5, 2001 are subject to a fee of \$50. Full payment is required and no refunds will be granted if cancellation is received on or after February 5, 2001. Substitutions may be made at any time.

SDI reserves the right to make changes in programs and speakers, or to cancel programs when conditions beyond its control prevail. Every effort will be made to contact each enrollee if a program is cancelled. If a program is not held, SDI's liability is limited to the refund of the program fee only.