

CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION



Resilience & Reinvention

2021 ANNUAL CONFERENCE

November 30-December 3, 2021

Portola Hotel, Two Portola Plaza, Monterey, CA 93940



Message FROM THE PRESIDENT

PLEASE JOIN US!

Resilience and
Reinvention

2021

Dear CCBSA Members:

It is my pleasure to invite you to the 127th CCBSA Annual Conference to be held in Monterey, California from Tuesday, November 30 to Friday, December 3, 2021. This annual gathering of Clerks is not only a great opportunity to receive training on a variety of subjects concerning Clerks practice, but it is also a chance to meet others who 'do what you do' to share ideas and experiences.



The conference will be held at the newly renovated Portola Hotel & Spa and is adjacent to the Monterey Conference Center. For those of who plan to do a little sightseeing while in Monterey, the hotel is located in the heart of downtown Monterey and is just steps away from historic Fisherman's Wharf and the Monterey Bay. Unforgettable adventures await you in Monterey – dive into underwater exploration at the Monterey Bay Aquarium, tee off at one of twenty golf courses, stroll and explore Cannery Row, make friends with the 'locals' (sea otters) or cruise the scenic coastline on a bike. There's so much to see and do in Monterey!

The Conference Planning Committee has prepared an impressive curriculum, focused on 'Resilience and Reinvention'. As you read through the program outlined in the next few pages, you will see that the Conference is structured to deliver an array of educational courses on assessment appeals, records management, emergency management and specialized subjects such as creating successful relationships with your Board, engaging employees during challenging times, growing our natural resilience, and reinventing ourselves to meet the moment.

In addition to great educational programs, there will be many opportunities to build networks with your colleagues from across the state, volunteer on our Association committees, earn certification points, and have fun!

Please look at our conference program and make your plans to join in November for the 2021 Conference!

I look forward to welcoming you to Monterey!

Robin Stieler

President, California Clerk of the Board of Supervisors Association (CCBSA)

2021 OFFICERS AND EXECUTIVE COMMITTEE AND CONFERENCE COMMITTEE

OFFICERS AND EXECUTIVE COMMITTEE

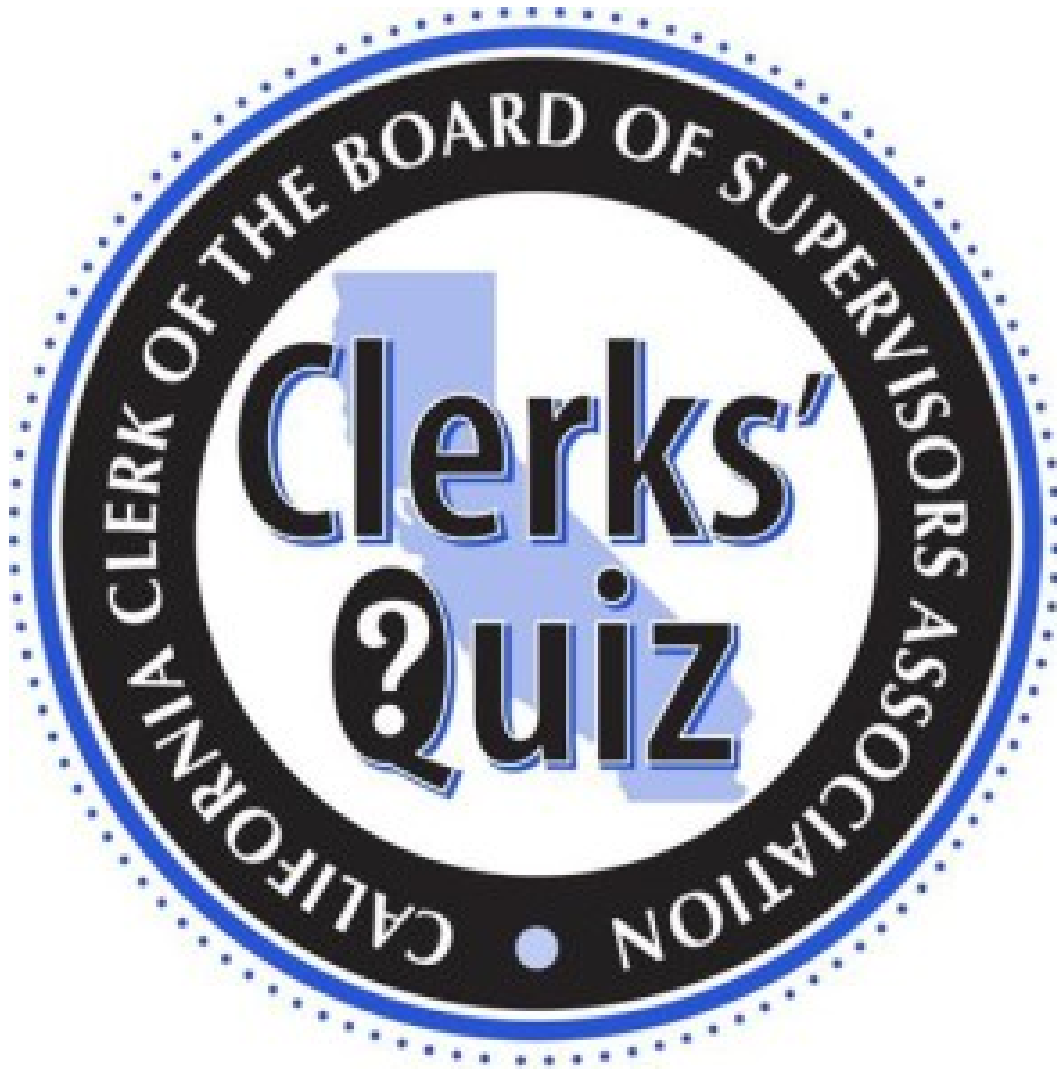
- Robin Stieler, President
County of Orange, Southern Region
- Rachél DeBord, Vice President
County of San Joaquin, Sierra Region
- Donna Johnston, Treasurer
County of Sutter, Sierra Region
- Ann Nordyke, Northern Region Chair
County of Colusa
- Mary Williams, Northern Region Co-Chair
County of Shasta
- Alicia Draves, Bay Region Chair
County of Solano
- Liz King, Sierra Region Chair
County of Stanislaus
- Kim Dawson, Sierra Region Co-Chair
County of El Dorado
- Jacquelyn Alexander, Coastal Region Chair
County of Santa Barbara
- Tracy Gauthier, Central Region Chair
County of Mariposa
- Danielle Wardle, Central Region Co-Chair
County of Mariposa
- Kecia Harper, Southern Region Chair
County of Riverside
- Andrew Potter, Immediate Past President
County of San Diego

ANNUAL CONFERENCE COMMITTEE

- Valerie Ralph, 2021 Host and Chair
County of Monterey
- Ryan Sharp
County of San Diego, Southern Region
- Julie Patterson-Hunter
County of Nevada, Sierra Region
- Donna Johnston, Treasurer
County of Sutter, Sierra Region
- Robin Stieler
*President and Immediate Future Host
County of Orange, Southern Region*

CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION
2021 Conference Nov. 30-Dec. 3, 2021

TEST YOUR KNOWLEDGE!



The 2021 CCBSA Clerks' Quiz will take place
from 8:30 a.m. to 5:00 p.m. daily.

Stop by and test your knowledge of California facts
and encourage your county colleagues to take the quiz!
The quiz closes at 11:00 a.m. on Thursday, December 2, 2021



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION Conference Schedule

Tuesday, November 30, 2021

8:30 AM- 9:00AM
Portola Room

Welcome to the 2021 CCBSA Conference

Valerie Ralph, *Clerk of the Board, County of Monterey*
Robin Stieler, *CCBSA President, County of Orange*
Rob O'Keefe & Jennifer Kocher, *Monterey County Convention & Visitors Bureau*

9:00AM-10:15AM
Portola Room

Creating Successful Relationships with Your Boards

Peter Johnson, *Director, Westgate Center for Leadership and Management Development Institute for Family Business*

Being successful in your role as clerk requires that you help the boards you serve be successful in serving the public. This means we need to understand how to communicate effectively in a way that builds trust and leads to productive meetings. In this session, we will discuss: How to create effective communication (email, in person and virtually) that builds trust with our boards and the public; Ways to help our boards stay on topic, on track and productive; and additional ways to support your boards that enables them to be successful

10:15am-10:30am

Break

10:30AM-11:30AM
Portola Room

From Records Management to Information Governance: The Evolution of Information Management

Jami Morritt, *Contra Costa County Chief Assistant Clerk of the Board/Senior Deputy County Administrator*

This is a workshop on records management and retention, from paper to electronic records. Other topics include records inventories, retention schedules, digital records, records disposition, & current trends in information management. Participants will be encouraged to ask questions and share best practices.

11:30AM-1:30PM

Lunch on Your Own/Early Hotel Check-In

1:30PM-2:45PM
Portola Room

Emergency Management During a Global Health Crisis

Kelsey Scanlon, *Monterey County Office of Emergency Services*

This presentation will discuss the County of Monterey's response to COVID-19, wildfires, and debris flows during 2020. Throughout the presentation we will discuss the application of traditional emergency management structures, creative solutions, and the cultural paradigm shift of emergency preparedness, response, and recovery as we transition into the next decade.

2:45PM-3:00PM

Break

3:00PM-4:00PM
Portola Room

Assessment Appeals: The Essentials

Wendy Strimling, *Assistant County Counsel, County of Monterey*
Iracema Lopez, *Office of the Clerk of the Board of Supervisors, County of Monterey*

An overview of the assessment appeals process with a focus on issues relevant to clerks for Assessment Appeals Boards (AAB). Topics will include the overall legal framework for assessment appeals, the role and responsibilities of the clerk, and overview of legally required AAB procedures. The workshop will also provide practical advice for managing the appeals process from the perspective of the clerk for the Monterey County AAB.

4:00PM-5:00PM
Portola Room

New Clerks Welcome/Overview of Mandated Responsibilities/CCBSA Certified Clerk of the Board Program

Robin Stieler, *CCBSA President (Orange)*, Rachel DeBord, *CCBSA Vice President (San Joaquin)* and Lynna Monell, *(San Bernardino), Chair of the CCBSA Education/Certification Committee*

An informal opportunity for new Clerks of the Board to learn more about the resources available to them through the Association, be assigned mentors and provided the opportunity to meet and network with other Clerks. Participants will learn how to attain the Certified Clerk of the Board of Supervisors designation which was created by the association to recognize those Clerks of the Board who have achieved a level of professionalism and leadership in their position.



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION

Conference Schedule

Wednesday, December 1, 2021

8:30 AM- 11:30AM
*Portola Room **

The resiliency factor – what is it and where can I get some

Pamela Miller, *Miller Management & Consulting Group*

Just when we think we cannot endure another change or setback, WHAM! here it comes. There are unprecedented demands on us these days as the chaos in our world continues. Local governments are operating in a messy and disruptive world and expectations to deliver seem endless and sometimes unattainable as we pivot, turn and do flips to continue finding new ways of doing things – both professionally and personally. Join us for this highly interactive session as we gain insight into navigating this ongoing state of vulnerability and regain some balance and energy by being adaptive, resilient, courageous, and yes, even a little selfish.

*Break during session from 10:00AM-10:15AM

11:30AM-2:00PM

CSAC Exhibit Hall and Luncheon

2:00PM – 5:00PM
Portola Room

Focused Roundtable

The Focused Roundtable session will provide opportunities for small group discussions on specific topic areas such as Remote Assessment Appeals Board Hearings and Board Meetings, Boards, Commissions, and Committees, COVID-19 impacts, etc. to facilitate idea sharing, the ability to work collaboratively to solve problems, and learn best practices.

Each discussion round will be 45 minutes, allowing you to fully participate in engaging discussions in three different topic groups. Following the three rounds, Group Facilitators will provide a brief summary of the discussions to the entire group. You'll have an opportunity to choose three of the following topics that interest you:

- Remote Assessment Appeals Board Hearings - Lessons Learned
- Remote Board of Supervisor Meetings – Lessons Learned
- Boards, Commissions and Committee Tracking (best practices)
- COVID-19 impacts to Clerk of the Board operations/New ways of doing business
- Retirements and how to recruit new staff to lead the next generation of Clerks
- Impacts of potential Brown Act amendments (AB 339 and AB 361) and remote participation

6:30PM-10:00PM
By invitation only

CCBSA Welcome Dinner

We invite you to join us for this year's Welcome Dinner. Join your CCBSA colleagues and Emeriti for an evening sharing good food and moments together! More information regarding this year's Welcome Dinner will be provided soon by our Host Clerk Valerie Ralph.



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION Conference Schedule

Thursday, December 2, 2021

8:30 AM- 9:45AM

Portola Room

Engaging Employees During Challenging Times

Catherine Crusade, Employee Engagement Manager, County of Monterey

When employees are engaged, they are emotionally committed to the organization and are willing to put forth discretionary effort. In other words, employees go the extra mile. Research shows that engagement impacts the bottom line with decreased turn-over and increased productivity, morale and quality customer service. A significant component of engagement is the employee's relationship with his/her immediate manager/supervisor. Therefore, in this session you will learn how to leverage:

1. The GROW coaching model, focused on asking vs telling, which can enhance communication and interactions between you and your staff.
2. The Progress Principle, a concept based on a Harvard University research study, that can support your staff in focusing on the small wins they achieve during this challenging time while engaged in meaningful work.

9:45AM-10:00AM

Break

10:00AM-11:30AM

Portola Room

State of Technology Roundtable

An opportunity for CCBSA technology sponsors to tell us what's coming with their product and give members an opportunity to provide feedback about using their products.

11:45AM-2:00PM

CSAC Luncheon & Election of Officers/Lunch presentation of Clerks' Quiz award winners

2:00PM-4:00PM

Portola Room

CCBSA Annual Business Meeting

6:00 PM-7:00PM

Bayview Room

Marriott Hotel

California Clerk of the Board of Supervisors Association (CCBSA) Installation of Officers/Reception

California State Association of Counties (CSAC) Annual Banquet/Installation of Officers/Reception

Friday, December 3, 2021

9:00AM- 10:00AM

Bonsai Room

2022 CCBSA Executive Committee meeting



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION

Workshop Presenters



Peter Johnson

Director, Westgate Center for Leadership and Management Development and the Institute for Family Business in the Eberhardt School of Business at the University of the Pacific

Peter Johnson has been working with boards for over 25 years. He has been elected and appointed to serve on a variety of public boards from the State to the local level. He has conducted board training for 30 City boards and almost 60 county boards in addition to his work with non-profit and for-profit boards. He has served as Board Chair of the County Planning Commission and LAFCO and regularly advises the Board of Supervisors on issues related to running effective meetings.

As an educator, consultant and speaker, Johnson works with government agencies and family businesses to develop leadership solutions to business challenges. He received his MBA from the University of the Pacific and a BS in Management from San Diego State University. He is a graduate of Leadership Stockton and a former member of Vistage. Johnson is married with three children and has completed multiple marathons including the New York Marathon and the Marine Corp Marathon and enjoys camping and traveling with family and friends. He believes his life purpose is to help organizations achieve their mission through better leadership.



Jami Morritt

Chief Assistant Clerk of the Board of Supervisors, County of Contra Costa

Jami Morritt has served as the Chief Assistant Clerk of the Board of Supervisors since 2015. Prior to working for Contra Costa County, Miss Morritt was the Records Manager for the City of Berkeley. As the Chief Assistant Clerk of the Board, Miss Morritt manages the Clerk of the Board division of the County Administrators office. Miss Morritt is principally responsible for the administration of the Board of Supervisors and the Assessment Appeals Board meetings; compliance with open meeting laws; management of the records of appointment and vacancy notices for Boards, Commissions and Committees;

provides training to staff for agenda management and advisory bodies; and maintains legislative records of the Board of Supervisors. Miss Morritt is a graduate of the University of California, Los Angeles and received her Master's in Library and Information Science specializing in Records Management and Archives from San Jose State University.



Kelsey Scanlon

Emergency Services Planner, County of Monterey

Kelsey Scanlon is an Emergency Services Planner for the County of Monterey Office of Emergency Services. She has been in the Emergency Management field for 8 years, working for Sonoma County Fire and Emergency Services and the Northern Virginia Emergency Response System.

Throughout her career, Kelsey has been deployed to several Emergency Operations Centers, most notably for the 2017 Sonoma Complex Fire, 2018 Camp Fire, 2020 Monterey Fires. Kelsey holds a Bachelor of Science in Political Communications from Emerson College and Master of Science in Engineering Management from George Washington University.



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION

Workshop Presenters



Wendy Strimling

Assistant County Counsel, Office of County Council, County of Monterey

Wendy Strimling is an Assistant County Counsel in the Office of County Counsel for the County of Monterey. She has been the primary legal advisor to the Monterey County Assessment Appeals Board for more than a decade, and she is the supervising attorney of the Monterey County Counsel's Land Use Division. Ms. Strimling holds a J.D. from Berkeley Law, a Master's degree in Sociology from University of Wisconsin -- Madison, and a B.A. from the University of California Santa Cruz.



Pamela Miller

Miller Management & Consulting Group

Pamela is the Owner and Principal of Miller Management & Consulting Group (www.millermcg.com), focusing on the development of people and organizations through specialized training, strategic planning and consulting. After having worked a number of years for other people doing this work, she started her own firm in 2014. Pamela has provided professional facilitation, consulting, team building and training services to local governments in California and Michigan, as well as statewide and international organizations.

In addition to her many municipal and county clients, she is Co-Director for the Alameda, Contra Costa and Sacramento Valley Leadership Academies. Pamela also currently serves as California Institute Director for the Master Municipal Clerk and Clerk of the Board Academy. She is the former Program, Executive and Institute Director for Continuing Education for Public Officials (CEPO).

Pamela has been the Executive Director for the California Association of Local Agency Formation Commissions (CALAFCO) since 2012. In this capacity she works with all 58 local agency formation commissions (LAFCo) throughout the state, guides a 16 member Board of Directors and provides state-level legislative advocacy for the association. Her prior local government experience in California includes working for the City of Vallejo and the Counties of Contra Costa and Napa, and in Michigan she was an executive-on-loan to the Emergency Manager appointed by the Governor to the City of Benton Harbor.

Pamela earned a Master's Degree in Organizational Leadership and a Bachelor's Degree in Business Administration from Siena Heights University. She is certified in Total Quality Management and Success Signals, is a graduate of the National Community Development Institute's Community Builders Leadership Institute and is a member of Women Leading Government.



CALIFORNIA CLERK OF THE BOARD OF SUPERVISORS ASSOCIATION

Workshop Presenters



Catherine Crusade, ACC, CPCC

Employee Engagement Manager, County of Monterey

As the County of Monterey's Employee Engagement Manager, Catherine leverages employee feedback to create and implement department specific and Countywide programs, such as the launch of a coaching program and development of the Leadership Learning Exchange- a comprehensive micro-learning and coaching website for aspiring and current leaders, including the "Take the Lead" internal podcast. Catherine's passion for coaching, public speaking and helping clients enhance their leadership skills led to her developing and presenting thousands of training courses, workshops, and presentations on.

a variety of topics such as: Emotional Intelligence, Coaching, Conflict Management, Communication, Change Management, Customer Service, Diversity and Inclusion, and Leadership.

Catherine's coaching career spans over 20 years and includes:

- Providing career and outplacement coaching to managers and senior executives from Fortune 50 to Fortune 500 companies
- Facilitating one-on-one, team and group coaching sessions for public sector leaders
- Teaching coaching skills to help clients maximize their workplace interactions.

Catherine completed graduate level course work through Harvard University Extension and UCLA Extension and earned a Bachelor of Science degree in Marketing from Shippensburg University. She completed two comprehensive professional coaching programs and earned the Certified Professional Co-Active Coach designation, as well as accreditation through the International Coach Federation.



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