



CSDA General Manager Leadership Summit Report

Summit Dates: Monday, June 30 – Tuesday, July 1

Prepared for: Board of Directors, Stakeholders

Prepared by: Rachel Rose

Overview

The GM Leadership Summit provided vital insights into governance, internal controls, grant readiness, technology, public relations, energy efficiency, and emerging tools for small special districts. Focus areas included legal compliance, organizational alignment, internal system upgrades, grant procurement strategies, and leveraging AI and cloud-based technologies to improve efficiency.

Top 5 Strategic Insights

1. **Legal Compliance Needs Attention:** The GM's current employment structure (1099) may pose legal risks and audit flags — conversion to W-2 should be considered immediately.
 2. **Grants Are Within Reach:** With proper project readiness and internal coordination, the district is well-positioned to win federal infrastructure grants.
 3. **Technology Is Lagging but Fixable:** Critical IT infrastructure like district-owned hardware, secure email, and backup systems need immediate upgrades.
 4. **Transparency Builds Trust:** Pursuing CSDA's Transparency Certificate will not only improve public perception but also support future grant applications and compliance.
 5. **Board-GM Alignment Is Foundational:** A structured, strategic planning cycle (with goal-setting, evaluations, and dashboards) is essential for long-term success.
-





Seminar Highlights

1. Building Alignment Seminar – Jacob Green, Jacob Green & Associates

Summary: Led by Jacob Green, CEO and leadership consultant specializing in organizational development and disaster management for California agencies, this seminar focused on strengthening collaboration and clarity between Boards and General Managers through strategic planning, structured communication, and performance evaluation frameworks.

Key Takeaways:

- The Board sets **vision, goals, and budget**; the GM **executes**.
- Performance evaluations must come from the full board in **duly noticed meetings**, not individual members.
- Goal-setting should be done in **open-to-closed sessions**, then finalized in public.
- Annual goals: 1-, 4-, and 10-year strategic planning is recommended.
- A **Board onboarding book** is essential.
- District-wide alignment improves talent retention and trust.
- Use dashboards to measure performance and ensure accountability.
- Consider **360 evaluations** and self-assessments as part of GM review.
- GM title should be clarified (contractor vs employee) to avoid legal risk.
- Align agendas and performance evaluation with policy and legal structures.

2. Federal Grants Seminar – TFG & NSDA

Summary: TFG and the NSDA (the only approved federal grants partner for California Special Districts) presented on how small districts can secure federal grants by being strategic, proactive, and well-prepared. This seminar outlined the full grant lifecycle—from project identification and readiness to application, compliance, and post-award auditing.

Key Takeaways:

- Most grants require a **match** and a **clear project vision**.
- Pre-registration (e.g., UEI, DUNS) is required; this process can take months.
- Select 3–5 key projects; define outcomes using the **"5Ws"** method.
- Grants.gov is the primary search engine for federal grants.
- Expect **1–2 years ROI** and delays due to DODGE and federal freeze/thaw cycles.
- If denied, always request **feedback** to improve future submissions.





Heather Glen Community Services District

- Emphasize **readiness** and local support in applications.
- Build internal systems for reporting, auditing, and project tracking.
- Grants can fund meters, energy upgrades, delinquent accounts (through assistance programs), and more.

3. IT & Cybersecurity Seminar – Corey Kaufman, VC3

Summary: Presented by IT expert Corey Kaufman (VC3), this seminar covered the fundamentals of effective modern IT management for small districts, emphasizing the importance of proactive cybersecurity, dependable infrastructure, and long-term technology planning.

Key Takeaways:

- **District-owned computer and email** are critical — no personal devices.
- Windows 10 reaches end-of-life **October 10, 2025**; Server 2016 in Jan 2027.
- Implement **Endpoint Detection & Response (EDR)** — antivirus alone is outdated.
- Ensure **cloud-based email**, secure backups, and **2FA**.
- IT planning should follow **18-month cycles**.
- Conduct regular **vulnerability assessments** (every 1–3 years).
- Maintain **both on-site and off-site backups** and test regularly.
- For emergency comms, consider options beyond traditional ISPs.
- Co-managed IT (in-house + vendor) is common and scalable.

4. Blue Ribbon Leadership Seminar

Summary: Presented by award winning Coachella Valley Public Cemetery District & Desert Recreation District, this seminar emphasized the strategic value of pursuing organizational awards and certifications, demonstrating how public recognition can strengthen trust, enhance transparency, improve internal operations, and increase competitiveness for grants and talent acquisition.

Key Takeaways:

- Start with the **CSDA Transparency Certificate** — only 4% of districts have it.
- Progress to **District of Distinction**; longer-term, higher cost, but worth it.
- Awards help secure **grants**, attract talent, and protect against criticism.





Heather Glen Community Services District

- Board should adopt a **resolution** to pursue awards.
- Share award outcomes with the public — it's a **community celebration**.
- CSDA offers scholarships for leadership training and support.

5. AI Tools & Digital Transformation Seminar – Beth Z, “Your Nerdy Best Friend”

Summary: Hosted by technology expert and author, Beth Ziesenis, this seminar explored emerging AI tools that districts can use to improve internal productivity, public communication, and administrative efficiency. It also covered ethical considerations, legal limitations, and security policies for responsible AI adoption, emphasizing the need for district-specific policies and annual training.

Key Takeaways:

- Use **ChatGPT, Perplexity, Gemini, Canva, Superhuman** for AI productivity.
- Otter.ai or Microsoft CoPilot for **meeting recording & summaries**.
- Train staff and adopt clear **AI usage policies** (privacy, fair use, compliance).
- AI Day (annual): evaluate tools, train team, and review integrations.
- Use **two-tool verification** (cross-check one AI output with another).
- Integrate AI for **public content**, newsletters, policy writing, and even code generation.

6. Efficiency & Automation Seminar – Mac Clemmens, Streamline

Summary: This seminar explored digital tools and platforms designed to enhance transparency, ensure compliance, support asset tracking, and streamline board operations—all while maintaining alignment with Brown Act and public transparency standards.

Key Takeaways:

- Streamline offers **one-click doc publishing**, newsletter tools, and record retention.
- **DocAccess.com** makes PDFs ADA-compliant within seconds.
- **CheckMyDistrict.org** helps ensure full ADA compliance.
- Use **Notion, Basecamp, Trello, or ClickUp** for board/project management.
- Tools like **DocuSign, LaserSign, and Notarize** streamline public forms.
- GIS tools (ESRI, IamGIS, CALCAD, Ziptility) are key for infrastructure asset tracking.
- Secure a **.gov domain** — it's **free**, trustworthy, and may be required in 3 years.
- Implement **password managers** (Bitwarden, 1Password) and track digital assets.





Heather Glen Community Services District

Post Conference Actions & Recommendations

Category	Action Item	Owner	Deadline/Notes
Governance & Legal	Review GM employment status (1099 vs W-2)	Board / Legal	Audit & legal concern
	Update performance eval process in GM contract	Board / GM	Include 360, self-eval
	Add second signature on checks	Rick Wood (CSDA) & GM	Internal control
	Review all district policies	Rick Wood (CSDA) & GM	Ensure compliance
	Review Retention Policy vs Brown Act	GM / Legal	Compliance check
Strategic Planning	Schedule board goal-setting session	GM	Plan 3–4 hour workshop
	Develop 1, 4, and 10-year strategic goals	GM & Board	To align planning cycles
Technology & Cybersecurity	Purchase district-owned laptop for GM	GM	ASAP
	Establish .gov domain & board emails	IT / GM	Improves trust, free
	Conduct IT assessment & backup plan	VC3 / GM	Include EDR, hardware review
	Implement password manager and email security	IT	Onepass or Bitwarden
HR & Finance	Compare HR/payroll platforms (QB, SDRMA, Easeworks)	GM	Prioritize ease + security





Heather Glen Community Services District

	Begin Transparency Certificate application	GM / Admin	Boosts public trust
	Research CSGM certification	Rick Wood (CSDA) / GM	Professional development
Grants & Funding	Identify 3–5 grant-ready projects	GM / Consultant	Include data, timelines
	Subscribe to NSDA Friday newsletter	GM / Admin	Grant monitoring
	Set up grant submission process & controls	GM / Admin	Assign internal leads
Communications & PR	Work with Tripepi Smith on messaging	GM	Strategy, visuals, outreach
	Create newsletter & public comment system	GM / Admin	Use Streamline tools
Tools & Software	Evaluate & adopt AI tools for tasks	GM / Admin	ChatGPT, Otter, Gemini, etc.
	Adopt project/task management tool	GM / Admin	ClickUp, Notion, Trello
	Review online payment platforms	GM / Admin	AllPaid, PayGov, etc.

Vendor Information Overview

The following table lists CSDA-affiliated and conference-recommended vendors providing essential services to support and improve district operations, efficiency, and compliance.





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
IT & Cybersecurity	VC3	IT services provider	Corey Kaufman: Recommends district-owned computer, IT assessment, endpoint protection (EDR), backup testing, cloud-based email
	Streamline	Website & compliance services	.gov domain support, newsletters, ADA docs, public portals, retention policy compliance
	The Kya Group	IT & cybersecurity consulting	Can assist with secure systems and data protection
	Superhuman	AI email management	Smart inbox, auto-follow-ups, extracts data from PDFs, integrates with Outlook
	Google Workspace / Microsoft 365	Productivity & cloud tools	AI features (CoPilot, Notebook LM), meeting tools, collaboration
	Scribe	Documentation tool	SOPs, onboarding, and internal training





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
Accounting, HR & Payroll	Black Mountain Software LLC	Utility billing & accounting	Supports sewer/water billing for 102 customers
	QuickBooks Online	Accounting/payroll software	Does not support 457 plan; used currently
	Easeworks	HR/payroll platform	Evaluate vs QB and SDRMA
	SDRMA	HR & insurance services	Includes payroll and liability insurance
	Empower	HR & payroll provider	Simplifies staff and payroll management
	CalPERS	Public pension system	Required for public employee retirement
	SageView Advisory Group	Retirement benefits planning	Helps develop long-term benefits packages





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
Banking & Financial Services	CBC – California Bank of Commerce	District banking partner	Rachel Robins: \$63 fee for card processing via QB (can pass to customers)
	Chase Bank / River City Bank	General banking options	For comparison/possible secondary accounts
	CalTRUST	Investment pool for public funds	Safe investment vehicle for reserves
	AllPaid / PayGov.us / PayPal / Paymentus	Online payment processors	Accept customer payments; evaluate for ease and fees
	NHA Advisors, LLC	Health program financial advisory	For employee benefits and wellness funding
	Public Relations & Comms	Tripepi Smith	Public relations & marketing
Upwork		Freelance hiring platform	Find professionals for calculators, newsletters, technical tasks





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
	Notion / Trello / ClickUp / Basecamp	Project/task mgmt. tools	Help organize board/admin tasks and collaboration
	Canva / Venngage / Grammarly	Design, accessibility, and writing tools	ADA-compliant docs, public content creation
Infrastructure & Energy	SitelogIQ	Energy consulting & infrastructure	Kristy Coughlin: Solar, battery, EV charging, 50%+ funded, CDC grants, can present to board
	Schneider Electric NA	Water/sewer energy optimization	Boosts infrastructure efficiency
	Climatemc	Facility climate solutions	HVAC and climate control options
	Capita Program Management	Infrastructure project oversight	Manages large-scale capital improvement projects
	CALCAD (California CAD Solutions)	CAD/GIS mapping	Infrastructure design and tracking





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
	ESRI / IamGIS / Ziptility	GIS systems	Asset tracking, field service, AI-enabled
Governance, Legal & Strategic Consulting	Riddell Municipal Strategies	Governance & municipal consulting	Offers strategy for compliance and policy improvement
	Institute for Local Government	Board training & policy tools	Supports long-term board capacity building
	MRG LLC / Aries Advisors	Strategy consultants	Organizational development and efficiency support
	LCW / BBK	Employment law firms	GM employment/legal contract advisement
Budgeting & Transparency	OpenGov	Budgeting & financial dashboard	Jack has info; supports transparency & board reporting
	GovDeals, Inc	Surplus auction service	Sell unused or surplus district assets





Heather Glen Community Services District

Category	Vendor	Description	Notes & Opportunities
	ScholarShare Investment Board	College savings benefit program	Optional employee benefit
	SDLF (via CSDA)	Governance training & awards	Transparency Certificate, District of Distinction programs
Forms, Compliance & Accessibility	DocAccess.com	PDF ADA compliance	Auto-fixes accessibility, 3¢/page, live tool with IRA blind access support
	CheckMyDistrict.org	Website accessibility checker	ADA compliance for district website & docs
	Adobe / DocuSign / LaserSign / DocuFree	E-signature & form services	Use for board forms, public comments, contracts
	Notarize	Remote notary service	\$25 per use; convenient for remote approvals





Conclusion

The 2025 CSDA General Manager Leadership Summit reinforced the critical role that ongoing training and professional development play in the success of special districts. The insights gained—from governance best practices to technology modernization and public accountability—are not only timely but directly applicable to our district's evolving needs.

These industry-specific learning opportunities strengthen decision-making, foster innovation, and ensure compliance with ever-changing regulations. Just as importantly, they build valuable connections with peers, experts, and trusted vendors who understand the unique challenges small districts face.

To stay effective and forward-thinking, it is essential that board members and key district personnel continue to engage in future conferences and educational programs. Investing in leadership development and staying informed through events like this will directly enhance the district's ability to serve the community with transparency, efficiency, and confidence.

This report is submitted for review and consideration by the HGCSD Board of Directors and relevant stakeholders.

Submission Date: September 22, 2025

