



**SHOWCASE YOUR DISTRICT'S COMMITMENT TO TRANSPARENCY**

**District Transparency Certificate Application**

**Purpose**

To promote transparency in the operations and governance of special districts to the public/constituents and provide special districts with an opportunity to showcase their efforts in transparency.

**Duration**

2 Years

**Application Cost**

FREE

**District Receives**

- Certificate for display (covering 2 years)
- Press release template
- Recognition on the SDLF website
- Letter to legislators within the district's boundaries announcing the achievement
- Recognition in CA Special District magazine and the CSDA eNews

**Basic Requirements**

CURRENT ETHICS TRAINING FOR ALL BOARD MEMBERS (*Government Code Section 53235*)

- Provide copies of training certificates along with date completed

COMPLIANCE WITH THE RALPH M. BROWN ACT (*Government Code Section 54950 et. al* )

- Provide copy of current policy related to Brown Act compliance
- Provide copy of a current meeting agenda (including opportunity for public comment)

ADOPTION OF POLICY RELATED TO HANDLING PUBLIC RECORDS ACT REQUESTS

- Provide copy of current policy

ADOPTION OF REIMBURSEMENT POLICY, IF DISTRICT PROVIDES ANY REIMBURSEMENT OF ACTUAL AND NECESSARY EXPENSES (*Government Code Section 53232.2 (b)*)

- Provide copy of current policy

ANNUAL DISCLOSURE OF BOARD MEMBER OR EMPLOYEE REIMBURSEMENTS FOR INDIVIDUAL CHARGES OVER \$100 FOR SERVICES OR PRODUCTS. THIS INFORMATION IS TO BE MADE AVAILABLE FOR PUBLIC INSPECTION. "INDIVIDUAL CHARGE" INCLUDES, BUT IS NOT LIMITED TO: ONE MEAL, LODGING FOR ONE DAY, OR TRANSPORTATION. (*Government Code Section 53065.5*)

- Provide copy of the most recent document and how it is accessible.

TIMELY FILING OF STATE CONTROLLER'S SPECIAL DISTRICTS FINANCIAL TRANSACTIONS REPORT - INCLUDES COMPENSATION DISCLOSURE. (*Government Code Section 53891*)

- Provide copy of most recent filing.
- SDLF staff will verify that district is not listed on the State Controller's 'non-compliance list'*

CONDUCT ANNUAL AUDITS (*Government Code Section 26909 and 12410.6*)

- Provide copy of most recent audit and management letter and a description of how/where documents were made available to the public

OTHER POLICIES – HAVE CURRENT POLICIES ADDRESSING THE FOLLOWING AREAS

*Provide copies of each:*

- Conflict of Interest
- Code of Ethics/Values/Norms or Board Conduct
- Financial Reserves Policy

## Website Requirements

MAINTAIN A DISTRICT WEBSITE WITH THE FOLLOWING ITEMS REQUIRED. (provide website link)

Required items available to the public:

- Names of Board Members and their terms of office
- Name of general manager and key staff along with contact information
- Election procedure and deadlines
- Board meeting schedule (Regular meeting agendas must be posted 72 hours in advance pursuant to *Government Code Section 54954.2 (a)(1)* and *Government Code Section 54956 (a)*)
- District's mission statement
- Description of district's services/functions and service area
- Authorizing statute/Enabling Act (Principle Act or Special Act)
- Current District budget
- Most recent financial audit
- Archive of Board meeting minutes for at least the last 6 months
- List of compensation of Board Members and Staff and/or link to State Controller's webpage with the data

ADDITIONAL ITEMS – website also must include at least 4 of the following items:

- Post Board Member ethics training certificates
- Picture, biography and e-mail address of board members
- Last (3) years of audits
- Reimbursement and Compensation Policy
- Financial Reserves Policy
- Online/downloadable public records act request form
- Audio or video recordings of board meetings
- Map of district boundaries/service area
- Link to California Special Districts Association mapping program
- Most recent Municipal Service Review (MSR) and Sphere of Influence (SOI) studies (full document or link to document on another site)

## Outreach/Best Practices Requirements

(Must complete at least 2 of the following items)

REGULAR DISTRICT NEWSLETTER OR COMMUNICATION (PRINTED AND/OR ELECTRONIC) THAT KEEPS THE PUBLIC, CONSTITUENTS AND ELECTED OFFICIALS UP-TO-DATE ON DISTRICT ACTIVITIES (at least twice annually)

- Provide copy of most recent communication and short description on the frequency of the communication, how it's distributed and to whom.

COMMUNITY NOTIFICATION THROUGH PRESS RELEASE TO LOCAL MEDIA OUTLET ANNOUNCING UPCOMING FILING DEADLINE FOR ELECTION AND PROCESS FOR SEEKING A POSITION ON THE DISTRICT BOARD, PRIOR TO THAT ELECTION (OR PRIOR TO THE MOST RECENT DEADLINE FOR CONSIDERATION OF NEW APPOINTMENTS FOR THOSE DISTRICTS WITH BOARD MEMBERS APPOINTED TO FIXED-TERMS).

- Provide copy of the press release (and the printed article if available)

COMPLETE SALARY COMPARISON/BENCHMARKING FOR DISTRICT STAFF POSITIONS USING A REPUTABLE SALARY SURVEY (AT LEAST EVERY 5 YEARS)

- Provide brief description of the survey and process used as well as the general results

SPECIAL COMMUNITY ENGAGEMENT PROJECT

Designed and completed a special project promoting community engagement with the district (potential projects may be broad in nature or focus on specific issues such as rate-setting, recycled water, identifying community needs, etc.)

- Submit an overview of the community engagement project reviewing the process undertaken and results achieved

HOLD ANNUAL INFORMATIONAL PUBLIC BUDGET HEARINGS THAT ENGAGE THE PUBLIC (OUTREACH, WORKSHOPS, ETC.) PRIOR TO ADOPTING THE BUDGET

- Provide copy of most recent public budget hearing notice and agenda.

**COMMUNITY TRANSPARENCY REVIEW**

The district would be required to obtain a completed overview checklist from at least 2 of the following individuals (the district may choose to conduct the overview with these individuals simultaneously or separately):

- Chair of the County Civil Grand Jury
- Editor of a reputable local print newspaper (only one may count toward requirement)
- LAFCO Executive Officer
- County Auditor-Controller
- Local Legislator (only one may count toward requirement)
- Executive Director or President of local Chamber of Commerce
- General Manager of a peer agency (special district, city or county)
  - Provide proof of completion signed by individuals completing Community Transparency Review



SHOWCASE YOUR DISTRICT'S COMMITMENT TO TRANSPARENCY

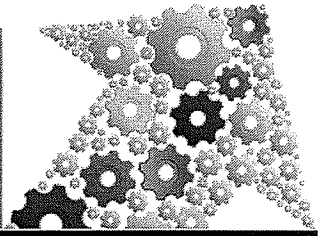
**District Transparency Certificate of Excellence**

**Submit Application**

Submit this application along with all required documentation to:

**SPECIAL DISTRICT LEADERSHIP FOUNDATION**  
 1112 I Street, Suite 200  
 Sacramento, CA 95814  
 Phone: 916-231-2939 • Fax: 916-442-7889

DISTRICT:		
MAILING ADDRESS:		
CITY:	STATE:	ZIP:
CONTACT NAME:		
CONTACT TITLE:		
PHONE:	FAX:	
EMAIL:	WEBSITE:	
ASSEMBLY MEMBER(S)*:		
SENATOR*:		
LOCAL NEWSPAPER(S):		
I CERTIFY THAT THE INFORMATION SUBMITTED IS ACCURATE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.	SIGNATURE:	



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Districts of Distinction

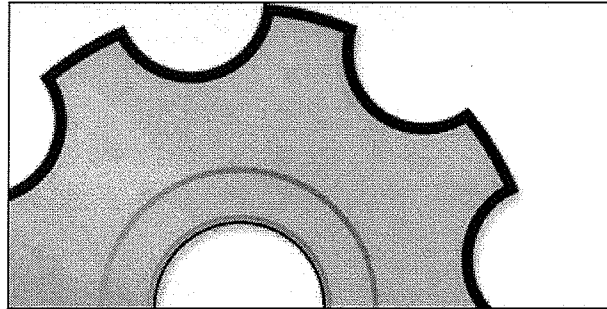
Recognition in Special District Governance

Special District Administrator Certification

District Transparency Certificate of Excellence

Board and Staff

Contact Us



**Special District  
Administrator Certification**

**IMPORTANT**

Application

Checklist

List of Transparency Certificate Holders

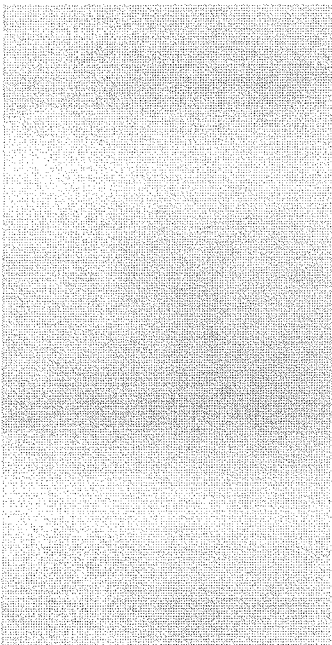
**Transparency Certificate Holders**

- *Chico Area Recreation & Park District (2013)*
- *Contra Costa Water District (2013)*
- *Elk Grove Water District (2013)*
- *Fulton-El Camino Recreation & Park District (2013)*
- *Olivenhain Municipal Water District (2013)*
- *Pine Cove Water District (2013)*
- *San Jacinto Valley Cemetery District (2013)*
- *Steger Sanitary District (2013)*
- *Vista Irrigation District (2013)*

**TESTIMONIALS**

**OMWD has always committed itself to openness and transparency, and we were excited to see the Special District Leadership Foundation develop a program through which we have been better able to demonstrate this commitment to our customers. Going through the application processes also helped us to recognize where additional steps could be taken to improve our already robust transparency efforts. Thanks to SDLF for developing the program!**

**- Olivenhain Municipal Water District**





SHOWCASE YOUR COMMITMENT TO EXCELLENCE

## Districts Of Distinction Application

The Districts of Distinction program is an accreditation program that enables districts to demonstrate to their communities, the media and legislators their commitment to operate in a sound, responsible manner. Districts apply for designation as a District of Distinction by submitting financial audits, policies and procedures and proof of training received by directors and executive staff.

### Requirements:

#### FINANCIAL AUDITS

Districts must demonstrate they undergo regular financial audits, have no major deficiencies and apply any recommendations to future years.

*What to submit:*

- Copies of the three most recent district audits, including financial statements and management letters. Each audit, including findings and recommendations, will be reviewed by a member of the Certification & Audit Review Advisory Committee. Committee members are volunteers from the special district community, including district controllers, directors of finance and SDA certified general managers.

#### POLICIES AND PROCEDURES

Districts must demonstrate that their operations conform to all statutes and regulations under state law as reflected in a policies and procedures manual. Policies and procedures should focus on governance, ethics, board conduct, district finances, reserves, reimbursement/compensation, etc.

*What to submit:*

- Copy of your district's current approved policies and procedures manual.
- Copy of your district's Board minute action adopting and/or having reviewed the policies and procedures manual within the past year.

### Training

Districts must demonstrate that all directors/trustees, general manager and executive staff (as designated by the district) have received training in governance as well as compliance with AB 1234 Ethics Training and AB 1825 Harassment Prevention Training.

*What to submit:*

Documentation showing class attendance, such as certificate of completion for each board member, general manager and other executive staff members (as identified by the board) in the following areas:

- Governance Training:** Six hours of basic governance training within the past five years. Governance Foundations, offered by CSDA's Special District Leadership Academy, satisfies this requirement. Other courses may qualify as well, however will need to be submitted for review by SDLF.
- Ethics Training:** Documentation verifying completion of AB 1234 ethics compliance training within the last two years.
- Harassment Prevention Training:** Documentation verifying completion of AB 1825 harassment prevention training within the last two years.

### Other

Districts must also include the following items with the accreditation/re-accreditation application:

*What to submit:*

- Board of Directors roster
- List of executive staff, including titles
- Proof of current compliance with CA State Controller reporting requirements including district financial and compensation data
- Completed application for accreditation/re-accreditation
- Accreditation/re-accreditation application fee
- Completed SDLF District Transparency Certificate of Excellence

Is your district a District of Distinction?

**Frequently Asked Questions (FAQs)**

**Who should apply to be a District of Distinction?**

Any California special district that wants to demonstrate publicly the effectiveness of its operations. Applying for this designation shows that your district understands and respects the responsibilities inherent to providing essential public services in a fiscally responsible manner.

**What does a district receive for completing the program?**

Districts of Distinction earn the right to use the program's seal on district materials and a plaque honoring their accomplishment. SDLF will also write and issue press releases and notify legislators on a district's behalf.

**How does a district apply?**

Districts interested in earning the Districts of Distinction designation must complete the application and submit it along with the required documentation. Applications must also be accompanied by an application fee.

**If my district is a member of the Special District Risk Management Authority (SDRMA), will getting a District of Distinction accreditation save me money on my premiums?**

Yes. SDRMA offers Credit Incentive Points (CIPs) if your district earns the District of Distinction accreditation which can provide significant premium discounts. For more information, contact SDRMA at 800.537.7790 or visit [www.sdrma.org](http://www.sdrma.org).

**RE-ACCREDITATION**

**For how long is the designation valid?**

The Districts of Distinction designation is valid for two years and a district may be re-accredited by submitting the application and all current required documents for review along with the re-accreditation fee.

**Fees**

The fees are on a sliding scale, based on a district's ability to pay:



**Is your district a District of Distinction?**

INITIAL ACCREDITATION		RE-ACCREDITATION	
Annual operating budget	Fee	Annual operating budget	Fee
\$0-299,999	\$200	\$0-299,999	\$125
\$300,000-749,999	\$400	\$300,000-749,999	\$150
\$750,000-999,999	\$600	\$750,000-999,999	\$175
\$1,000,000-2,999,999	\$800	\$1,000,000-2,999,999	\$200
\$3,000,000 or more	\$1,000	\$3,000,000 or more	\$250

**Submit Application**

Submit this application along with all required documentation and payment to:

SPECIAL DISTRICT LEADERSHIP FOUNDATION  
1112 I Street, Suite 200  
Sacramento, CA 95814

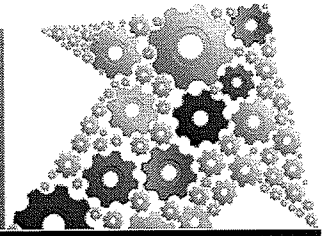
Phone: 916-231-2939 • Fax: 916-442-7889 • [www.sdlf.org](http://www.sdlf.org)

DISTRICT:		
MAILING ADDRESS:		
CITY:	STATE:	ZIP:
CONTACT NAME:		
CONTACT TITLE:		
PHONE:	FAX:	
EMAIL:	WEBSITE:	
ASSEMBLY MEMBER(S)*:		
SENATOR*:		
LOCAL NEWSPAPER(S):		
I CERTIFY THAT THE INFORMATION SUBMITTED IS ACCURATE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.		SIGNATURE:

PAYMENT	
TOTAL: \$	<input type="checkbox"/> CHECK <input type="checkbox"/> VISA <input type="checkbox"/> MASTERCARD <input type="checkbox"/> DISCOVER <input type="checkbox"/> AMERICAN EXPRESS
ACCT. NAME:	ACCT. NUMBER:
EXPIRATION DATE:	AUTHORIZED SIGNATURE:

\* Include all state legislators representing the district's area of operation.

Is your district a District of Distinction?



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Districts of Distinction

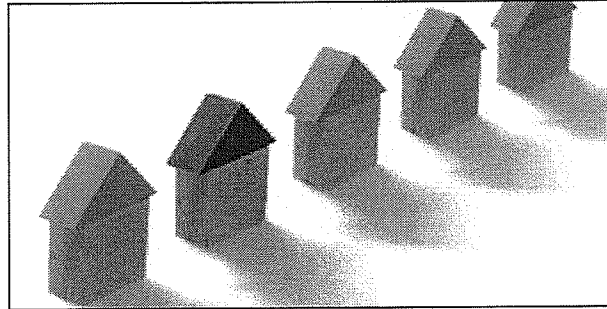
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Districts of Distinction

**IMPORTANT**

**District of Distinction Application**

**List of current Districts of Distinction**

**Guidelines for Formulating Sound Policies**

**Dollars and Sense**

**Open and Accessible**

**Entire Application Process**

**Districts of Distinction**

- *Bear Valley Community Services District (2007)(2009)(2011)*
- *Chico Area Recreation & Park District (2010)(2013)*
- *Chino Valley Independent Fire District (2008)(2010)(2013)*
- *Costa Mesa Sanitary District (2009)(2012)*
- *Cucamonga Valley Water District (2012)*
- *El Toro Water District (2007)(2009)(2012)*
- *Kern County Cemetery District (2009)(2011)*
- *Kensington Fire Protection District (2009)(2011)*
- *Leucadia Wastewater District (2010)(2012)*
- *Mesa Consolidated Water District (2007)(2009)(2011)*
- *North County Cemetery District (2007)(2009)(2011)*
- *Olivenhain Municipal Water District (2009)(2011)(2013)*
- *Pleasant Hill Recreation and Park District (2010)*
- *San Jacinto Valley Cemetery District (2011)(2013)*
- *San Ramon Valley Fire Protection District (2011)*
- *Southgate Recreation & Park District (2012)*
- *Stege Sanitary District (2009)(2012)*
- *Vista Irrigation District (2009)(2011)*