



NEW MEMBER TRAINING

Tracy Kennedy

CACTTC Education Conference 2020

NEW TREASURER–TAX COLLECTOR TOP 10

Timeline:

Tracy Kennedy

First Elected: 1990

Took Office: 1991

Currently: 8TH Term





NEW TREASURER-TAX COLLECTOR TOP 10

Number 1: Know your Role

- Treasurer Tax Collector vs. Auditor Controller:
 - Very different roles, responsibilities, and regulatory authority
 - Very different skill sets
 - Very different clientele

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Number 2: Learn from your experiences

- You learn more from your failures and struggles than you do from your achievements and accomplishments

“Don’t confuse GOOGLE with my 33 years of experience!”



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Number 3: Know Your Codes (Or Where to Find them)

- Government Codes
- Revenue and Taxation codes
- And MORE!



<https://leginfo.legislature.ca.gov/faces/codes.xhtml>

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Number 4: Attorney General Opinions

- The CA Attorney General (AG) provides legal opinions to State and local public officials and Government agencies.
- AG Legal opinions are highly regarded by the courts.



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Number 4: Attorney General Opinions

- Did you Know?
 - Opinion 04-1203 – May 11, 2005:
 - Once Investment Authority is Delegated (GC 27000.3):
 - Board of Supervisors MAY NOT set contract conditions for investment management services.

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Number 4: Attorney General Opinions

- Did you Know?
 - Opinion 15-1202 – December 30, 2016:
 - In part, to be appointed to an elected position, the person must be a registered voter in the County which is appointing them.



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Number 4: Attorney General Opinions

Other Important Legal Opinions:

Best Best & Krieger: Attorneys at Law

February 5, 2016

RE: Statutory Authority of the County Board of Supervisors

Over County Officers

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Number 5: Legislation Updates & Changes

- If the law doesn't make sense or is no longer relevant, or practical, "CHANGE IT!"
 - Just because we always did it "that way" doesn't mean it's the right way.
- Stay connected & informed

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Number 5: Legislation Updates & Changes

- Legislative proposal information, timeline, and instructions are emailed (usually in June) to ONLY the Treasurer-Tax Collector!
- It is VERY important to submit your proposals timely! No EXCEPTIONS!

Be on the lookout!



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Number 5: Legislation Updates & Changes

JULY 17, 2020: Platform memo and proposal worksheet e-mailed to all counties.

AUGUST 14, 2020: Deadline for receipt of proposals at SYASL.

AUGUST 2, 2020: SYASL e-mails proposals from counties to members of the Legislative Committee.

SEPTEMBER 10, 2020: Legislative Committee reviews and decides on legislative proposals; priority rankings assigned by committee.

SEPTEMBER 17, 2020: SYASL e-mails a copy of the proposed legislative package to all counties.

OCTOBER 7, 2020: Legislative Committee meeting at conference to hear appeals on rejected proposals.

OCTOBER 8, 2020: Platform presented to the full membership for vote at conference.

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Number 6: Continuing Education

- Re-Election Requires:
 - CE Units: Continued Education Units
 - CPE Units: Continuing Professional Education Units
 - All workshops offer these units

IT'S UP TO YOU TO KEEP TRACK!

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Number 7: Cross Train, Cross Train, Cross Train

FOUR DEEP!





NEW TREASURER–TAX COLLECTOR TOP 10

Number 7: Cross Train, Cross Train, Cross Train

- Employees become more aware of your organization's roles, functions, missions.
- Allows you to leverage their talents and skills.
- Increases morale and increased opportunities for employee advancement.
- Opportunity to strengthen customer support with more knowledgeable employees.

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Number 8: Public Appearances

- Board of Supervisor Meetings
- Press Releases
- Online Platforms & Social Media
- Public Events
- School Board Meetings



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Number 9: Elected Official VS. Appointed

- Know your power!



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Number 10: Utilize Your Resources:

CACTTC Web site: <https://cacttc.memberclicks.net/resources>

- Provides helpful links
 - Past Presentations
 - Webinars
 - Surveys
 - Treasurer's Reference Manual
 - School Finance Handbook
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- CACTTC Sparklist
 - CACTTC Directory

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Number 10: Utilize Your Resources:

- State Controller
- CSAC
- California Municipal Treasurers Association
- Government Investment Officers Association





QUESTIONS?



ALL GREAT
LESSONS AND
DECISIONS
START AND
END HERE!