

CARCD 72<sup>nd</sup> Annual Conference  
“Dynamic Partnerships, Relevant Results”  
November 2017 – Sacramento, CA



RESOURCE  
CONSERVATION DISTRICTS

# Everything Special Districts need to know about online compliance



STREAMLINE

SLOANE DELL'ORTO

- Public Records Act
- The Brown Act
- Financial Transaction Report
- Compensation Report
- Healthcare District requirement (AB 1728)
- Other Considerations



# **California: The Public Records Act**

## Public Records Act

What it is: a law passed by the California State Legislature and signed by the governor in 1968 requiring inspection or disclosure of governmental records to the public upon request, unless exempted by law. California Government Code §§ 6250 through 6270.5.

Online requirements (so far) come through two recent additions:

- SB 272
- AB 2853



## Public Records Act: SB 272 (new-ish)

**What it is:** Enterprise System Catalog requiring local agencies to create a catalog of “enterprise systems” that fit certain criteria, make it publicly available upon request, and post it in a prominent location on the website if they have one.



**What to do about it:** review the law and create a spreadsheet of all systems your agency uses that aren't exempt, or use Streamline's free Enterprise System Catalog tool ([www.getstreamline.com/sb272](http://www.getstreamline.com/sb272)). Compliance was due by July 1, 2016.

Make sure to post a link on your website in a prominent location!

[Agencies](#) / [Acme Fire District](#)

# Acme Fire District

[✎ Edit agency profile](#)123 Main Street, Sacramento, CA 95814 — 916-238-1800 — [Edit](#)

## Step 1: System inventory

Create an inventory of all computer systems your agency uses, and qualify each of them for inclusion in your enterprise system catalog.

We'll walk you through each step to ensure you're including the proper systems.

[+ Add system](#)

Hydrant tracker

Microsoft Office Suite

Some systems are not required to be included in your catalog, but you can still keep them here so you'll remember when you update your catalog next year. Anything exempt will appear below for your reference.

Emergency Call Log

Not required

GPS and Planning System

Not required

## Step 2: Catalog revisions

Your agency has a published catalog.

[View](#)[Print](#)[+ Add catalog revision](#)Oct 31, 2016 8:51pm **Published**[Show 11 older revisions](#)

## About

SB 272 adds a new requirement to the California Public Records Act. It requires **every local agency**, except local educational agencies, to create a catalog of enterprise systems. Each agency must make the catalog publicly available upon request in the office of the person or officer designated by



Search... Go!

ABOUT THE DISTRICT

- MISSION & HISTORY
- STAFF
- BOARD MEETINGS
- PUBLIC MEETINGS
- BOARD MEMBERS
- RELATED LINKS
- TRANSPARENCY

## District Transparency

### Performance Reports

#### FY 2015/16 Annual Performance Report

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### Financial Reports

#### Audited Financial Statements and Compliance Reports, June 30, 2015

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### Public Notices

Public notices are posted in the local paper, and here, when they are available.

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### Staff

Our staff is dedicated to providing transportation service to meet the needs of our community.

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### 2015 YUBA-SUTTER SHORT RANGE TRANSIT PLAN

The 2015 Short Range Transit Plan (SRTP) study was conducted to assess transit and related transportation issues in Yuba and Sutter Counties and to provide a "road map" for improvements to the public..

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### ENTERPRISE SYSTEM CATALOG

As required by SB 272, enacted January 2016 with compliance required by July 1, 2016.

[VIEW THE CATALOG »](#)



ADDRESS: **Yuba-Sutter Transit Authority**  
2100 B Street  
Marysville, CA 95901  
PHONE: (530) 634-6880

## Enterprise System Catalog:

JULY 21, 2016

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VENDOR AND PRODUCT: **Intuit, QuickBooks**  
SYSTEM PURPOSE: Accounting  
CATEGORIES/TYPES OF DATA: Financial Transactions, Vendors and Customers  
DEPT./PRIMARY CUSTODIAN: Finance/Administration  
FREQUENCY OF COLLECTION: As needed  
FREQUENCY OF UPDATE: As needed

---

VENDOR AND PRODUCT: **Microsoft, Office**  
SYSTEM PURPOSE: Email, Word Processing, Spreadsheets  
CATEGORIES/TYPES OF DATA: Electronic Mail, Board Packets/Minutes, Public Notices, Operating Statistics, Inventory  
DEPT./PRIMARY CUSTODIAN: All  
FREQUENCY OF COLLECTION: As needed  
FREQUENCY OF UPDATE: As needed

---

VENDOR AND PRODUCT: **EPI Suite, GuardCard**  
SYSTEM PURPOSE: Identification Card Data  
CATEGORIES/TYPES OF DATA: Photos/Personal Information of Discount Eligibility Card Holders and Employees  
DEPT./PRIMARY CUSTODIAN: Administration  
FREQUENCY OF COLLECTION: As needed  
FREQUENCY OF UPDATE: As needed

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## FRESNO IRRIGATION DISTRICT

## Catalog of Enterprise Systems

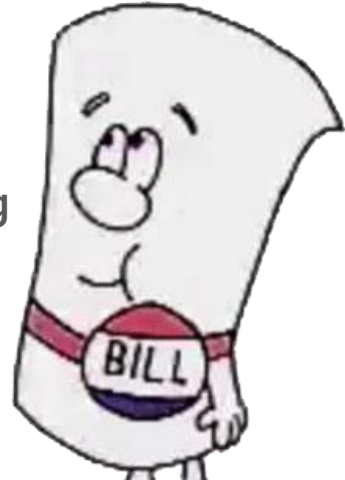
Pursuant to CA Government Code 6270.5

Vendor	Product	System Purpose	Description of Categories or Types of Data	Custodian	Frequency Collected	Frequency Updated
Laserfiche, Inc.	Laserfiche	Storage Of Records & Documents	Scanned documents of District records	Accounting Dept. Engineering Dept. Administration Safety Manager The Shop	Daily Daily Daily Daily Daily	As needed As needed As needed As needed As needed
Tyler Technologies, Inc.	Incode	Accounting software	Financial Accounting Data for the District Financial Accounting Data for the District	Accounting Dept. Engineering Dept. Safety Manager	Daily As needed As needed	Quarterly As needed As needed
Microsoft	Microsoft Office Suite	Office Automation	(for creating documents, data analysis, email) word processing & spreadsheets	Accounting Dept. Engineering Dept. Administration Safety Manager Water Department The Shop Maintenance & Construction	Daily Daily Daily Daily Daily Daily	As needed As needed As needed As needed As needed As needed
None	Custom Assessment	Issue and Track Assessments	Assessment charges, payments and water delivery information	Accounting Dept. Water Department	Daily Daily	As needed As needed

## Public Records Act: AB 2853 (new!)

**What it is:** In addition to maintaining public records for public inspection during the office hours of the public agency, a public agency may comply with subdivision (a) by posting any public record on its Internet Web site and, in response to a request for a public record posted on the Internet Web site, directing a member of the public to the location on the Internet Web site where the public record is posted.

**What to do about it:** post often-requested public records to your site, and point PRA requestors there, potentially saving lots of money. (Note that if they cannot access the site for any reason, you still have to provide printed copies.)





WHAT WE DO

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Financial Reports

Acme Municipal Utility District 2015-2016 Budget

Our budget is finalized in the first quarter of each calendar year for the upcoming fiscal year.

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2015 Compensation Report

The required financial information can be found on the Controller's Public Pay website at <http://publicpay.ca.gov/Reports/SpecialDistricts/SpecialDistricts.aspx>

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2015 Financial Transaction Report

[READ MORE »](#)

2014-2015 Financial Audit

Audits are performed by Acme Auditing Company and are available by September of each year for the previous fiscal year.

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How to make requests

HOW TO MAKE A PUBLIC RECORDS ACT REQUEST

Our most requested public financial documents are posted here on our website. If you cannot find the record you're looking for here, fill out this form to request it.

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PUBLIC RECORDS REQUEST POLICY OF ACME MUNICIPAL UTILITY DISTRICT

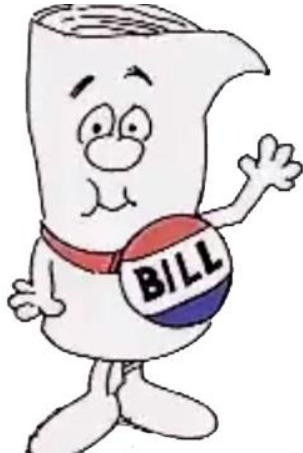
To establish District policy and guidelines concerning accessibility of District records.

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# **California: The Brown Act**

## The Brown Act: agenda posting













What it is: law governing meetings. At least 72 hours before a regular meeting... post an agenda containing a brief general description of each item of business to be transacted or discussed at the meeting... in a location that is freely accessible to members of the public and on the local agency's Internet Web site, if the local agency has one.



What to do about it: Set a reminder to post your agendas at least 72 hours before each meeting, including on your website (or use Streamline Web's agenda posting reminder tool so you never forget!)

# The Brown Act: Agendas

## Board of Directors Meetings

Date & Description	Agenda 	Minutes	Supporting Docs
 <b>Wed Aug 17, 2016</b> Meeting	<input checked="" type="checkbox"/> Send an email reminder ahead of the 72 hour agenda deadline  <b>When to send the reminder:</b> <input type="text" value="24 hours before agenda deadline"/> <b>Where to send the reminder to:</b>  <input type="text" value="sloane@getstreamline.com"/> <input type="button" value="Send a test email"/> <p>Note: agenda reminders will be sent for meetings added to your site only. We recommend adding meetings for the next few months ahead of time.</p>	 Not uploaded <input type="button" value="+ Add File"/>	<input type="button" value="+ Add File"/>
 <b>Wed Sep 21, 2016</b> Meeting		 Not uploaded <input type="button" value="+ Add File"/>	<input type="button" value="+ Add File"/>
 <b>Wed Oct 19, 2016</b> This meeting has been canceled		 Not uploaded <input type="button" value="+ Add File"/>	<input type="button" value="+ Add File"/>
 <b>Wed Nov 16, 2016</b> Meeting and Special Public Hearing			<input type="button" value="+ Add File"/>
 <b>Wed Dec 21, 2016</b> Meeting	 Due Sun Dec 18 <input type="button" value="+ Add File"/>		<input type="button" value="+ Add File"/>



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- About Special Districts
- Updates ▾
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DISTRICT GOVERNANCE

- BOARD
- MEETINGS
- MISSION
- STAFF
- DISTRICT TRANSPARENCY

# Meetings

All board and committee meetings are held in the district office at 123 Main Street, Acmeville CA. The public is invited to attend all open meetings. If you are interested in having an item added to an upcoming meeting agenda, please [contact us](#).

## 2017 Board of Directors

The Acme MUD board of directors meets on the third Thursday of each month at 7:00pm in the board room at the district office. The board may also schedule special meetings at other times when needed, and will post notice according to the Brown Act.

JAN <b>26</b> 2017	FEB <b>23</b> 2017	MAR <b>23</b> 2017	APR <b>27</b> 2017	MAY <b>25</b> 2017
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

[2017 Board o.](#) [2017 Board o.](#) [2017 Board o.](#) [2017 Board o.](#) [2017 Board o.](#)

JUN <b>22</b> 2017	JUL <b>27</b> 2017	AUG <b>24</b> 2017
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[2017 Board o.](#) [2017 Board o.](#) [2017 Board o.](#)

## BOARD MEMBERS

Acme Municipal Utility District is governed by an elected board of directors who are elected to serve by the people. The Board is elected at large by the voting public who reside within the District..

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## CONTACT US

We look forward to hearing from you.

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ACME MUNICIPAL UTILITY DISTRICT

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THIS ITEM APPEARS ON

BOARD OF DIRECTORS



## Board of Directors Meeting

- [Agenda](#)
- [Minutes](#)

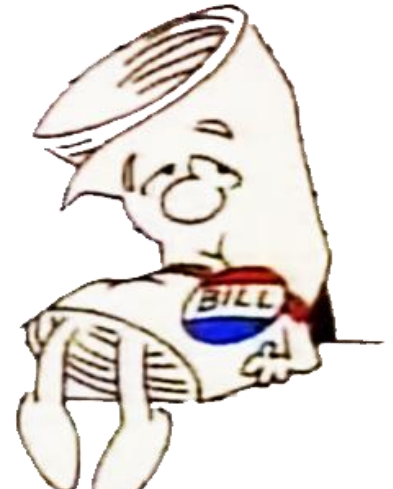
***Pro tip:** Instead of having separate sections for meetings, agendas, and minutes, add your agendas and minutes to each meeting, so that visitors can find what they're looking for based upon the meeting date.*



## The Brown Act: home page agenda (new)

**What it is:** AB 2257 - a brand new law dictating that agencies post the most recent agenda directly on the homepage of their website, in an electronically searchable / retrievable platform-independent format.

**What to do about it:** Be prepared by 2019 to post the most recent agenda to the home page in the required format (or use Streamline Web's automatic home page meeting feature so you don't have to worry about it).





## What We Do

We do various special district things that are very important. When we aren't doing that, we're busy doing our real jobs.

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## Services

We provide water and wastewater services to the town of Acmeville and its neighbors. The District contracts with Municipal District Services, LLC to read water meters, bill and collect monthly for..

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## Upcoming Events

When we do things, we post about them on our website so that you can decide to come do things too.

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## Upcoming Meetings

NOV  
**16**  
2016

Board of Directors Meeting  
and Special Public Hearing

DEC  
**21**  
2016

Board of Directors Meeting -  
**View Agenda**

JAN  
**18**  
2017

Board of Directors Meeting

# California: Reports (Controller)

## Financial Transaction Report

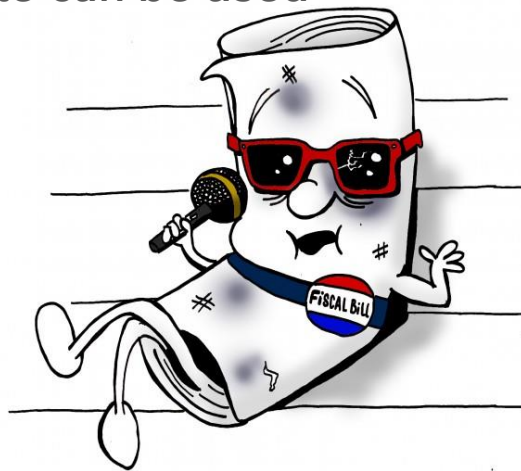
**What it is:** California Government Code Section 53891 and 53893, requiring local government agencies to submit a specific financial transaction report to the State Controller's office "within seven months after the close of each fiscal year"...shall either post it in a conspicuous location on its Internet Web site, or cause copies of the report to be prepared and the clerk of the legislative body shall furnish a copy to any person requesting it.

**What to do about it:** Visit the Controller's website for forms, and be sure that your agency is submitting the report each year. Make sure to post it on your website, if you have one.

## Compensation Report

**What it is:** A report that must be submitted to Controller's office by April 30 each year, including information on the annual compensation of its elected officials, officers, and employees. If the agency maintains a website, the report must be posted to a conspicuous location. Alternately a link to the Controller's PublicPay website can be used instead.

**What to do about it:** Visit the Controller's website for instructions, and complete your reports annually. If you have a website, post the report on your site as well, or post a link to <http://publicpay.ca.gov/> instead.



### WHAT WE DO

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## Financial Reports

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# California: Healthcare Districts

## Healthcare districts website requirement

**What it is:** As of January 2018, AB 1728 requires all healthcare districts to have a website with district contact information on it. (Note that all the other CA requirements apply as well.) The bill also requires districts to adopt an annual budget, and if they provide grants they will need to adopt grant policies.

**What to do about it:** Get a website if you don't already have one! If you do already have one, make sure it's compliant.



# Other Considerations

## Open Data

**What it is:** AB 169 is a California law defining what the term “open data” means, for content posted to an agency website. If you call it open data and you post it to your website, it’d better meet the guidelines, which are mostly about the searchability and structure of the data.

**What to do about it:** if your content doesn’t fit the requirements to be called open data, then just don’t call it “open data” :)



## Section 508 (Federal)

**What it is:** a Federal law requiring that various technology be accessible to people with disabilities. Web section concerns itself with making sure websites work effectively with assistive tech (screen readers, magnifiers, Braille readers, etc.)

**What to do about it:** You can use online testing software to check for Section 508 compliance. Reach out to your website vendor if your site isn't compliant - or just use Streamline Web.



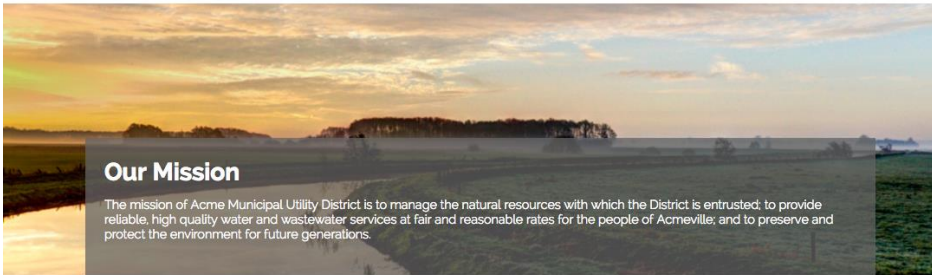
## Google's Mobile Friendly Update

**What it is:** Affectionately known as “Google Mobilegeddon,” it’s a recent update to Google’s search algorithm that penalizes (excludes!) sites that are not mobile friendly when a search is conducted on a mobile device - including smartphones and tablets.

**What to do about it:** Test your site online using Google’s tool at <https://www.google.com/webmasters/tools/mobile-friendly/> - and if your site isn’t mobile friendly, reach out to your website vendor for help or use mobile-friendly alternatives such as Streamline or Wordpress with a responsive theme.



# Mobile Friendly Matters



## Our Mission

The mission of Acme Municipal Utility District is to manage the natural resources with which the District is entrusted; to provide reliable, high quality water and wastewater services at fair and reasonable rates for the people of Acmeville; and to preserve and protect the environment for future generations.



FAQS



NOTICES



BOARD



MEETINGS



STAFF



SERVICES



### What We Do

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**16**  
2016

Board of Directors Meeting and Special Public Hearing

DEC  
**21**  
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Board of Directors Meeting

JAN  
**18**  
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Board of Directors Meeting



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FAQS



NOTICES



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## Literal, legal CA state requirements

*The first four are required even if you don't have a website*

1. Enterprise System Catalog - available at offices, post to website
2. Brown Act agenda posting - 72 hours in advance, add to website
3. Compensation Report - to Controller, add to site or link to PublicPay
4. Financial Transaction Report - to Controller, post to website
5. If you're a healthcare district, you're required to have a website as of January 2018, with "district contact information" as well as the above items

6. 2019: most recent agenda available via direct link on the home page

## So how do you keep on top of this stuff?

- CSDA (csda.net)
- Legislative updates (tinyurl.com/leginfo-reg)
- Attend CSDA chapter meetings
- Attend CSDA legislative days (at least you'll see it coming!)
- Peer groups (by district type, role type)
- Streamline mail lists (getstreamline.com/subscribe)

Whatever crazy laws come next, we're here to help:



STREAMLINE

[sloane@getstreamline.com](mailto:sloane@getstreamline.com) / (916) 900-6619