



SB 827

Fiscal and Financial Training

Monty Hanks

May 2026

Finance Committee

- SB 827 – Fiscal and Financial Training (every two years)
 - Required for Board Members and certain employees
 - Complete **two hours** of financial training every **two years**
 - Local officials hold a fiduciary duty to the public and a requirement to act as responsible stewards in guiding and managing local funds
 - Duty involves extensive and complex fiscal management responsibilities, such as tracking revenue streams (cash flow, liquidity) and creating restrictions (safety) that are in compliance with govt. code 53601
 - Approve policies such as NCPA's Debt & Investment Policy
 - Approve the delegation of investment duties to NCPA's Treasurer
 - Approve monthly Treasurer's Report
 - To ensure the management of funds is carried out in the public's interest

SB 827 - Summary

- Issue – New financial training requirements
 - Complete **two hours** of financial training every **two years**
- Applicable to:
 - NCPA Commissioners and Alternate Commissioners (local agency legislative body)
 - NCPA General Manager and Jane L., General Counsel (local agency executive)
 - NCPA AGMs – Monty, Jane C, Tony, and Mike D. (local agency executive)
 - NCPA Treasurer – Sondra (makes financial decisions)
- Training deadlines
 - Must complete training by January 1, 2028, unless that official's term of office ends before 1/9/2028
 - If service commenced on or after January 1, 2026, no later than six months, thereafter, two years



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Webinar: SB 827 Fiscal & Financial Training

When: Jun 17, 2026 from 01:00 PM to 03:00 PM (PT)

Presenter: Josh Byerrum, Platinum Strategies, Inc.

This webinar provides a comprehensive overview of the new mandates under Senate Bill 827, which require local agency officials to complete fiscal and financial training. Attendees will satisfy the new compliance requirement while gaining practical understanding of municipal budgeting, financial reporting, capital financing, debt management, and ethical stewardship of public resources. For officials commencing service on or after January 1, 2026, this training must be completed by no later than six months from the first day of service with the local agency. Every local agency official in a local agency's service as of January 1, 2026, and commenced that service prior to January 1, 2026, must receive this training before January 1, 2028.

This webinar fulfills the new SB 827 Fiscal and Financial Training requirements.

1:00 - 3:00 pm

Free CSDA Member
\$125 Non-member

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