



COUNCIL AGENDA: 05-22-07

ITEM: 3.5

# Memorandum

---

**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Lee Price, MMC  
City Clerk

**SUBJECT: REED REFORM #25 - COUNCIL  
ASSISTANTS CERTIFICATION**

**DATE:** May 8, 2007

---

## RECOMMENDATION

As recommended by the Rules and Open Government Committee on May 2, 2007, accept staff's recommendation on the proposed curriculum as outlined in the attached memo previously submitted to and approved by the Rules & Open Government Committee.



# Memorandum

**TO:** RULES & OPEN GOVERNMENT  
COMMITTEE

**FROM:** Deanna J. Santana

**SUBJECT:** REED REFORM #25 – COUNCIL  
ASSISTANTS CERTIFICATION

**DATE:** April 26, 2007

Approved

Date

4/26/07

## REASON FOR SUPPLEMENTAL INFORMATION

On April 25, 2007, the Rules & Open Government Committee accepted staff's recommendation on the proposed curriculum for a Council Assistant Certification Program, per Reed Reform #25. During the discussion, Councilmember Chirco asked for clarification on whether Part-Time employees would be required to participate. The staff report did not address Part-Time employees and this supplemental report provides a recommendation on this matter.

## RECOMMENDATION

- (a) Acceptance of the proposed curriculum for a Council Assistant Certification Program, per Reed Reform #25: *Create a certified training program for Mayoral and Councilmember staff to ensure they are fully aware of laws and ethical standards so they can help their bosses follow the law.*
- (b) Assign discretion to individual Councilmembers on the level of participation for Part-Time Council Assistants in the Council Assistant Certification Program for curriculum that is not required as a condition of employment or by state law.

## BACKGROUND

The staff report, dated March 29, 2007, states that the goal of this effort is to establish a certification program that informs Councilmember staff of the pertinent information needed to effectively support Councilmembers.

Given this goal, it is proposed that each Councilmember work with their Part-Time Council Assistants to determine level of participation based on core work assignments and/or duration of employment to individually meet the goal of the Council Assistant Certification Program. Part-

**HONORABLE MAYOR & CITY COUNCIL**

**SUPPLEMENTAL REPORT RE:** Reed Reform #25: Council Assistant Certification Program

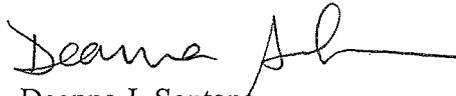
April 26, 2007

Page 2

Time Council Assistants must participate in any required training/sessions as a condition of employment and in any trainings/sessions that are required by state law. As stated during the discussion, often times Part-Time Council Assistants are employed to work on a single subject area and or for a period of time. This proposal results in compliance with City employment requirements and allows in the opportunity to participate in curriculum pertinent to the Part-Time Council Assistant workload.

**COORDINATION**

This content of this memorandum was coordinated the Offices of the City Attorney and Clerk.

  
Deanna J. Santana  
Deputy City Manager

For additional information on this report, please contact Deanna J. Santana, Deputy City Manager, at 535-8280.



# Memorandum

**TO:** RULES & OPEN GOVERNMENT  
COMMITTEE

**FROM:** Les White  
Rick Doyle  
Lee Price

**SUBJECT:** REED REFORM #25 – COUNCIL  
ASSISTANTS CERTIFICATION

**DATE:** March 29, 2007

## RECOMMENDATION

- (a) Acceptance of the proposed curriculum for a Council Assistant Certification Program, per Reed Reform #25: *Create a certified training program for Mayoral and Councilmember staff to ensure they are fully aware of laws and ethical standards so they can help their bosses follow the law.*
- (b) Refer to the full City Council for consideration at the April 17, 2007 City Council meeting.

## OUTCOME

Establish a certification program that informs Councilmember staff of the pertinent information needed to effectively support Councilmembers.

## BACKGROUND

On January 30, 2007, Council approved staff's update on the implementation of the Reed Reforms. At that time, staff noted that the Administration would use the City Council Orientation Sessions as a model for a certified training program and return to Council in 60 days with a recommendation on implementation. Since that time, staff has explored the development of a Certification Program that includes core public administration curriculum, as well as a continuous training module to address subject areas that Council Assistants expressed a desire to obtain additional training.

## ANALYSIS

The City Attorney's Office has developed an Ethics Training for Council Assistants based on the mandatory ethics training for local public officials required by AB1234. The topics covered include general ethical principals, and state and local regulations of conflicts of interest, gifts, use of public resources, Brown Act, Public Records Act, mass mailing regulations, nepotism, and the Council- Staff Interaction Policy. The first session was held on February 7, 2007 and was

**HONORABLE MAYOR & CITY COUNCIL**

Subject: Reed Reform #25: Council Assistant Certification Program

March 29, 2007

Page 2

attended by approximately 30 Council and Mayoral Assistants. The session will be repeated in August 2007 for new Assistants, as well as those who could not attend the first session.

***Council Certification Program Overview***

On March 23, 2007, the City Manager's Office hosted a meeting with staff from each of the Council Offices to solicit input on what additional training topics would be meaningful to them. The proposed Program incorporates input/feedback provided at that meeting, as well as an overview of the comments received on March 23 related to the framework for the Certification Program.

Table 1 provides detail on the proposed Council Assistant Certification Program, which consists of four half-day sessions that combined cover a broad range of legal and ethical issues, along with City policies and services. The proposal also includes a Continuous Training component with consists of voluntary participation in frequent sessions covering a broad range of issues, as initiated/brainstormed by Council Assistants. Additionally, the proposed Program includes mandatory participation in annual study sessions on ethics and any sessions as so directed by the City Council.

Table 1: Council Assistant Certification Program

SESSION 1	SESSION 2	SESSION 3	SESSION 4
<ul style="list-style-type: none"> <li>▪ Overview of form of government, City Charter, and City structure/ organization</li> <li>▪ Review of City Council Appointees' roles and responsibilities</li> <li>▪ Review of budget process, detail, and schedule</li> <li>▪ Review of City Service Areas' purposes and core services</li> <li>▪ Review of intergovernmental relations process, guidelines and priorities, and overview of state and federal legislative process/calendar</li> <li>▪ Redevelopment Agency Overview</li> </ul>	<p>City Attorney Ethics Training: General Ethics principals Conflicts of interest Gifts</p> <ul style="list-style-type: none"> <li>▪ Brown Act /Open Government procedures</li> <li>▪ Use of Public resources</li> <li>▪ Public Records</li> <li>▪ Nepotism</li> <li>▪ Charter Section 4.11</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strategic Support/Employee Services                             <ul style="list-style-type: none"> <li>▪ Overview of significant City Policies</li> <li>▪ Retirement/Employment</li> <li>▪ Procurement and Government accounting</li> <li>▪ City employment policy/procedures</li> </ul> </li> <li>▪ Media training</li> <li>▪ Leadership training</li> <li>▪ Customer Service</li> </ul>	<p>City Clerk Training on:</p> <ul style="list-style-type: none"> <li>▪ City Council Agenda Process/Council Committees</li> <li>▪ Public Records Act</li> <li>▪ City Council Grants process (e.g., HP Grants)</li> <li>▪ Boards and Commissions</li> </ul>
<b>CONTINUOUS TRAINING TOPICS</b>			
<ul style="list-style-type: none"> <li>▪ Briefings before study sessions (as a general practice)</li> <li>▪ Land Use Topics</li> <li>▪ Monitoring of Capital Projects</li> <li>▪ FPPC Training (application of requirement in practical terms)</li> <li>▪ Continuous VTA briefing</li> <li>▪ Permitting 101</li> <li>▪ Overview of Key Policies</li> <li>▪ Employment Land Conversions</li> </ul>			
<p>In addition to the topics listed above, the Council Assistants and Chiefs of Staff noted that it would be very useful to have quick reference documents provided at the sessions as well as post the materials on-line for quick reference. The group also recommended that hypothetical scenarios and real life examples by used when walking new Council staff members thru the land use process such as General Plan amendments and other topics that may be more complex.</p>			
<b>REQUIRED PARTICIPATION</b>			
<ul style="list-style-type: none"> <li>▪ Annual Ethics Training</li> <li>▪ Ethics Study Sessions/Reviews by City Council</li> </ul>			

**HONORABLE MAYOR & CITY COUNCIL**

Subject: Reed Reform #25: Council Assistant Certification Program

March 29, 2007

Page 3

*Program Administration*

The City Manager's Office, in coordination with the Council Appointees, will be responsible for the logistical tasks associated with scheduling of the four half day sessions. The City Clerk's Office will track staff compliance with this requirement and issue the formal certification, upon completion. The City Manager's Office and Department of Environmental Services will administratively support the Continuous Training effort. Staff is recommending that the Rules & Open Government Committee determine whether Council staff should participate in sessions, trainings, etc. that the City Council may hold.

<b>MILESTONES/SCHEDULE</b>	
March 23, 2007	Council Assistants meeting to brainstorm on monthly topics to provide voluntary training/review
April 4, 2007	Report Certification Training Program framework/concept to the Rules & Open Government Committee
April 10, 2007	City Council Study Session on Ethics
April 17, 2007	City Council consideration of the Certification Training Program (approval by full City Council)
August 3	SESSION 1 Certification Training Program
August 17	SESSION 3 Certification Training Program
August TBD	SESSION 2 Certification Training Program
September 7	SESSION 4 Certification Training Program
September 20	
(3 <sup>rd</sup> Thursday of the Month, 12:00 – 1:00 p.m.)	CONTINUOUS TRAINING SESSION 1: TBD
October 18	
(3 <sup>rd</sup> Thursday of the Month, 12:00 – 1:00 p.m.)	CONTINUOUS TRAINING SESSION 2: TBD
(3 <sup>rd</sup> Thursday of the Month, 12:00 – 1:00 p.m.)	CONTINUOUS TRAINING SESSION 3: TBD
November 15	
(3 <sup>rd</sup> Thursday of the Month, 12:00 – 1:00 p.m.)	CONTINUOUS TRAINING SESSION 4: TBD
December 20	
(3 <sup>rd</sup> Thursday of the Month, 12:00 – 1:00 p.m.)	CONTINUOUS TRAINING SESSION 5: TBD

**PUBLIC OUTREACH/INTEREST**

- Criteria 1:** Requires Council action on the use of public funds equal to \$1 million or greater. (Required: Website Posting)
  
- Criteria 2:** Adoption of a new or revised policy that may have implications for public health, safety, quality of life, or financial/economic vitality of the City. (Required: E-mail and Website Posting)
  
- Criteria 3:** Consideration of proposed changes to service delivery, programs, staffing that may have impacts to community services and have been identified by staff, Council or a Community group that requires special outreach. (Required: E-mail, Website Posting, Community Meetings, Notice in appropriate newspapers)

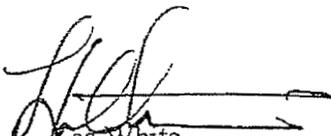
Staff engaged Councilmember staff in a session to solicit input to the development of this program on March 23, 2007.

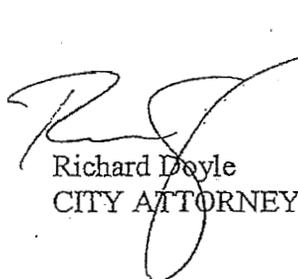
**COORDINATION**

This content of this memorandum was coordinated with Council Assistants and the Department of Environmental Services.

**CEQA**

Not a Project.

  
Les White  
CITY MANAGER

  
Richard Doyle  
CITY ATTORNEY

  
Lee Price  
CITY CLERK

*For additional information on this report, please contact Deanna J. Santana, Deputy City Manager, at 535-8280.*