



Memorandum

**TO: HONORABLE MAYOR AND
CITY COUNCIL**

FROM: Dennis Hawkins

SUBJECT: SEE BELOW

DATE: February 21, 2011

REPLACEMENT

SUBJECT: MODIFIED COUNCIL ASSISTANT CERTIFICATION CURRICULUM

REASON FOR REPLACEMENT: The revised memo and attachment include additional details about the proposed modifications to the training schedule and curriculum.

RECOMMENDATION

Approve the modified Council Assistant Certification Curriculum

BACKGROUND

On December 15, 2010, the Rules and Open Government Committee approved the Council Assistant Certification Curriculum. Over the past few weeks staff has been preparing for the training and has received some input regarding the training format and schedule, which warrants further discussion with the Committee and possible modifications.

ANALYSIS

The current curriculum is based on weekly sessions, each Monday morning, for up to four (4) hours each for approximately eight consecutive weeks. Staff has received feedback that Monday mornings are not a good time for many Council offices due to various ongoing commitments. In addition, the four-hour duration of each session further complicates Council staff schedules.

Based upon this input, as well as the scheduling demands of staff who will be presenting the various topics, I am recommending a revised curriculum which shortens each training session, moves the training to Thursdays or Fridays, provides more focus to each session, and gives flexibility in the schedule for participants. The core curriculum elements are unchanged, and the modified format may actually allow deeper discussion of key topics than was previously possible. I have consulted with the Office of the City Manager and the Office of the City

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Attorney, two key partners in this effort, and they concur with the recommended revised format and schedule.

EVALUATION AND FOLLOW-UP

The Office of the City Clerk will obtain participant and presenter input following each session and will provide a report to the Committee detailing survey results with suggestions for further improvements to the program.

PUBLIC OUTREACH/INTEREST

This action does not meet the criteria set below; however, the Office of the City Clerk will post the item on the City's Website for the February 23 Rules and Open Government Committee.

- Criterion 1:** Requires Council action on the use of public funds equal to \$1 million or greater. **(Required: Website Posting)**
- Criterion 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)**
- Criterion 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)**

CEQA

Not a project.



DENNIS D. HAWKINS, CMC
City Clerk

For questions, please contact Dennis Hawkins, City Clerk, at (408) 535-1275.

COUNCIL ASSISTANT CERTIFICATION PROGRAM CURRICULUM

Program Design: Each session will be no more than 2 ½ hours. Program will be interactive with speakers, panel discussion, exercises, and small group discussion.

Learning Objectives: Each participant will achieve the following:

1. A better understanding of the structure of San Jose government; the role and responsibilities of San Jose's elected officials; and the function and organization of City services.
2. Awareness of key City policies and procedures so that Council staff is fully aware of laws, ethical standards, and City policies and procedures.

Session 1: Introduction to San Jose Government – Part 1

- City Charter, Municipal Code, and City Council Policies
- Council Appointees
 - City Manager
 - City Attorney
 - City Clerk
 - City Auditor
 - Independent Police Auditor
 - Redevelopment Agency Executive Director

Session 2: Introduction to San Jose Government – Part 2

- Council-Manager form of Government, City Charter Sections 300 and 411
- City Organization and Operations
 - City Service Areas and Departments
 - Redevelopment Agency

Session 3: Council Agenda Process and Open Government Requirements

- Brown Act and Open Government/Sunshine Reforms
- Council Rules of Conduct
- Council Agenda process
- Council memo format
- Public Records Act requests
- Records Retention Schedule and Procedures

COUNCIL ASSISTANT CERTIFICATION PROGRAM CURRICULUM

Session 4: City Budget process

- City Manager's Budget Office
- Council Study Sessions
- Mayor's Budget Messages

Session 5: State Ethics and Disclosure Requirements

- AB 1234 Training

Session 6: City Ethics and Disclosure Requirements

- Disclosure of Fund Raising (DFR1)
- Outside Income & Time
- Gift Ordinance/Family Gift Reporting Form
- Conflicts of Interest
- Revolving Door
- Prospective employment

Session 7: Political Reform Act/Fair Political Practices Commission Requirements

- Form 460/470
- Form 700
- Form 801/802/803

Session 8: City Fiscal Policies and Procedures

- Council Policies
 - Expenditure and Reimbursement Policy and Procedures
 - City Procurement Card Policy
 - Food and Beverage Policy
 - Other fiscal and procurement policies
 - Special Events
 - Grants (HP, Constituent Outreach, District)
 - Mayor and City Council Travel
 - Arena Ticket Distribution

Session 9: Special Event Planning and Coordination

- Event Planning 101
 - Resource Planning (venue selection; budgeting; donors and sponsors; staffing and volunteers; permits; logistics, etc.)
 - How to partner effectively with City departments and staff

COUNCIL ASSISTANT CERTIFICATION PROGRAM CURRICULUM

Session 10: Key City Employment Policies and Procedures

- Key City Policies (topics include, but not limited to:)
 - Labor Relations
 - Use of Internet and City equipment
 - Employment
 - Harassment and Anti-Discrimination
 - Nepotism
 - Outside employment

Session 11: City Boards and Commissions

- Charter Commissions
- San Jose Municipal Code, Section 2.08
- Council Policies
 - 0-4: Consolidated Board and Commission
 - 0-36: Council/Commission Code of Conduct
 - 0-37: Code of Conduct in Chambers and Committee Rooms

Session 12: Land Use

- General Plan
- Zoning and Development Process
- Code Enforcement

Session 13: Intergovernmental Relations

- Collaboration with local agencies:
 - Santa Clara Valley Water District
 - Open Space Authority
 - School Districts
- County, Regional, and State Agencies
 - LAFCO
 - VTA
 - ABAG
- State and National organizations
 - National League of Cities
 - League of California Cities
 - Santa Clara County Cities Association
- Legislative Guidelines, Process, and Priorities
 - State and Federal Government
 - State and Federal Agencies
 - City Lobbyists

Session 14: Community Engagement & Media

- Community Engagement Process and Policies

COUNCIL ASSISTANT CERTIFICATION PROGRAM CURRICULUM

- Media Policies
- Panel Discussion – How to effectively partner with City staff

Session 15: Course Completion

- Tour of City Facilities (may include the following: Police Administration & Communications Center; Fire Station; Community Center; Library branch; Corp Yard; Traffic Operations Center; WPCP)
- Luncheon and presentation of Certificates

Session 16: For Chiefs of Staff

- Classified and Unclassified Staff
- Recruitment and Selection
- Performance Evaluation and Management
- Key City Policies and Procedures

Continuous Training:

- Quarterly:
 - Topics to be determined
- Annually:
 - Conflicts of Interest (Form 700, etc.)
 - Council Policies
- Biennially
 - AB 1234 Training
 - Harassment and Discrimination