



City Clerks New Law and Elections Seminar

Empowering New Leaders: Essential Strategies for Effective Council/Board Member Onboarding

December 12, 2024



To: mcuppy@cityofsacramento.org; Stacy Leitner

Tue 8/6/2024 11:53 AM

Retention: CORC 2 Year Policy - Delete All Other Folders (2yrs and older) (2 years) Expires: Thu 8/6/2026 11:53 AM

Dear Mindy and Stacy,

The officers of the City Clerks Department of the League of California Cities invite you to present a session for our 2024 City Clerks New Law and Elections Seminar. They would love to include a session about onboarding and felt you would be the perfect choice to bring this session to life. Here are the details:

What: Presentation on council onboarding at the 2024 City Clerks New Law and Elections Seminar
Where: The Meritage, Napa
When: Dec. 12, 2024
Time: 3:30-5:00 p.m.

If you are available and interested in putting together and presenting this session, please respond to this email. If you would like to proceed, I'll share next steps, deadlines and additional conference info. As presenters, you would receive a complimentary one-day registration, or 30% off full conference registration (deadlines apply).

1



Stacy Leitner

To: mcuppy@cityofsacramento.org



Retention: CORC 2 Year Policy - Delete All Other Folders (2



I thought we were friends? 😊

2



Mindy Cuppy <mcuppy@cityofsacram

To: Stacy Leitner



Retention: CORC 2 Year Policy - Delete Al



I didn't ask to do this! We are friends.

3

Hi Kayla,

I'm happy to reach out to Mindy this week to discuss our availability and the invitation. Curious to know...how did we hit the jackpot to receive the invite to co-present this session?

4

Sounds great, thank you! During the conference planning process, officers discussed the need for an onboarding session in light of the timing of the conference, and both of your names came up as clerks who would lead a great session on the topic.

Thanks,

We would ❤️ to know who offered
our names so we can return the favor ?



A photograph showing multiple hands of various skin tones raised in the air against a plain white background. The hands are positioned at different heights and angles, creating a sense of collective action or participation. The focus is sharp on the hands in the foreground, while those in the background are slightly blurred.

Hands Up Survey

Overview

- Gain essential knowledge and strategies for onboarding newly elected and appointed council/board members.
- Understand the importance of a smooth transition to promote effective governance and uphold legal and ethical standards.
- Learn best practices and practical tips to assist you in your onboarding.
- Discover ways to support, integrate, and enhance the effectiveness of new council/board members in their roles.

City of Rancho Cordova



City of Sacramento



Provide a Comprehensive Orientation



- Orientation approaches/strategies will differ and that's **OK!**
 - New council/board member orientation
 - When? What's the timing? It's not 1-day, it's a process.
 - What's shared?
 - Who leads these? Who attends these?
 - In-person meetings?
 - Manuals and handbooks
 - Onboarding checklists ☒

Onboarding - Think New Employee Orientation



Your Onboarding Roadmap

Council/Board Governance and Meeting Overview

A light orange downward-pointing arrow indicating the flow from the first step to the second.

Communications Practices

A pink downward-pointing arrow indicating the flow from the second step to the third.

Department Overviews

A blue downward-pointing arrow indicating the flow from the third step to the fourth.

Administrative Support, Training, and Resources

Council/Board Governance

- Form of Government
- Mayor/Vice Mayor, Board Chair
 - Norms of rotation and selection, roles and responsibilities
- Council/Board Member
 - Roles and responsibilities
- Agency Commissions, Oversight Boards, etc.
 - Roles and responsibilities
- Regional Boards and Ad-hoc Committees
 - Roles and responsibilities

Roles and Responsibilities of Councils/Boards

- Legislative Decision-Making
- Budget Oversight
- Community Representation
- Strategic Planning
- Set Policy
- Oversight of Administration
 - City Manager
 - Administrator
- Public Engagement
- Legal and Ethical Compliance
- Emergency Response



Characteristics of Effective Governance

Effective City Council/Board

- Represents all residents
- Uses a collaborative approach in decision-making to create policies and deliver services to meet the needs of the community
- Thinks big picture and long-term
- Demonstrates respect for one another, disagrees agreeably and professionally
- Provides clear direction to the City Manager
- Follows legal requirements

Effective Council/Board Member

- Maintains a citywide perspective, represents all residents
- Assumes good intent
- Respects the experience and expertise of city staff to provide factual, neutral information to the City Council
- Acknowledges their own potential biases, listens with an open mind, and demonstrates respect and consideration to all
- Shares information
- Asks questions
- Keeps confidential matters confidential
- Commits the time necessary to prepare and participate

Possible Roles and Responsibilities of the City Manager, City Attorney, and City Clerk

City Manager

- Policy development, recommendations, and implementation
- Day-to-day administration of staff
 - Leads staff & contractors
 - Implements an annual budget
- Review of documents for any special and/or regular meetings
- Council/Board communication
- Negotiates contracts

City Attorney

- Provides legal advice regarding matters
- Advises at meetings
- Drafts new laws
- Represents the city in legal actions
- Approves and negotiates contracts

Does Not:

Give legal advice to citizens or represent Council Members as individuals

City Clerk

- Meeting administration
- Elections administration
- Legal compliance
- Records management
- Administers Oaths of Office
- Administrative support
- Performs marriage ceremonies
- Plans parades
- Manages Sister City programs

Role Expectations Discussion

Activity: At each table, discuss the most important expectations for new members.

What do you think should be communicated clearly during onboarding to ensure new members understand their role and responsibilities?



LET'S TALK

Council/Board Meetings

- Open Meeting Governance
- Agenda and Agenda Packets
- Meeting Procedures



City Council Meetings

- Open Meeting Governance
 - Need a quorum in-person
 - Remote options
 - Open and public meetings, notice of meetings, and public participation
- Types of Meetings
 - Regular meetings, special meetings, emergency meetings, and adjourned meetings
- Rules of Order
 - Meetings are orderly and efficient.
 - Who presides over meetings? Who presides in their absence?
 - What parliamentary procedures are used?
 - What is the meeting schedule?



Regular City Council Meeting Agenda Overview

- Regular City Council Meeting Agenda Format (one example)
 - Call to Order/Roll Call
 - Recording Announcement
 - Pledge of Allegiance
 - Invocation
 - Presentations
 - New Employee Introductions, Recognition, Proclamations
 - Public Comment (Items Not on the Agenda)
 - Responding to the public
 - City Council Reports
 - City Manager's Report
 - Consent Calendar
 - Consent Public Hearing
 - Public Hearing
 - Regular Calendar
 - Council Requests for Future Agenda Items
 - Closed Sessions (as needed)



City Council Meeting Agendas

- Agenda and Agenda Packets (Comply with Brown Act)
 - How are items placed on the agenda? Some examples include:
 - City Manager
 - Staff agenda review meetings
 - Proposed by Council Members under Future Agenda Items at a City Council meeting (majority interest)
 - Departments prepare staff reports and provide supporting documentation
 - Department staff work with the City Clerk's Office to ensure noticing requirements
 - City Clerk's Office compiles the agenda packet
 - Agenda packet is published and distributed
 - Minimum of 72-hours regular meetings; 24-hours special meetings
 - Agenda titles must be sufficient to explain proposed action

City Council Meeting Procedures

- Council Agenda Items
 - Generally, consist of presentations and/or reports to provide information
 - Generally, consist of public hearings, ordinances, resolutions, and contracts for action
 - City Council Meeting Norms (Possible Sequence)
 - Staff presentation
 - Public comment
 - Discussion, comments and questions from City Council
 - Motion or direction to staff
 - Discussion by the City Council
 - Vote on motion, or verbal expression of consensus
- **Some hearings may require additional procedures.

City Council Meeting Procedures (Continued)

- Identifying conflicts of interests and/or contributions received under Levine Act
 - Use of recuse
- The City Council gives direction at meetings through motions and votes, which memorialize actions and directions.
 - The Mayor or a Council Member makes a verbal motion “I move to approve/deny/continue...”
 - Another Council Member can second the motion by verbally stating “I second the motion” before the City Clerk calls for a Roll Call vote
 - Substitute motions, amended motions
- Voting options
 - Yes, no, and abstain
- Vote results
 - Need majority of Council Members present to pass (unless 4/5 vote is required)
 - Tie votes fail

First City Council Meeting Overview

- Call To Order
- Television Announcement
- Pledge of Allegiance
- Invocation
- Certification of the General Municipal Election
- Special Ceremonies – Swearing In
 - Oath of Office
- Selection of Mayor and Vice Mayor
- Special Ceremonies – Swearing In
 - Oath of Office
- Presentation to Outgoing Mayor/Chair
- Celebratory Break

- Presentations
- Public Comment
- Consent Calendar Items
- Consent Public Hearing Items
- Public Hearing Items
- Regular Calendar Items
- Council Requests for Future Agenda Items
- Adjournment

Questions/To Do's

- Who would new members like to swear them in?
- Tour of Council/Board Chambers, seating at dais, evacuation procedures
- Tour of Council/Board Offices

Legal Requirements

Financial Disclosure Requirements

- Statement of Economic Interests (Form 700)
 - Filed within 30 days of assuming office
- Campaign Disclosures
 - What needs to be filed?

Conflict of Interests (Political Reform Act)

Required Trainings

- AB1234 Ethics
- Discrimination/Harassment

Onboarding Challenges Discussion Discussion

Activity: At each table, brainstorm five potential challenges new members may face during their onboarding process (e.g., understanding the organization's culture, navigating legal compliance).

Identify solutions to overcome these challenges.



LET'S TALK

Communications Practices

- City Manager/Administrator
- City Clerk, City Attorney, and Staff
- Among Council/Board Members
- Reporting Out on Regional Boards and Ad-hoc Committee Appointments

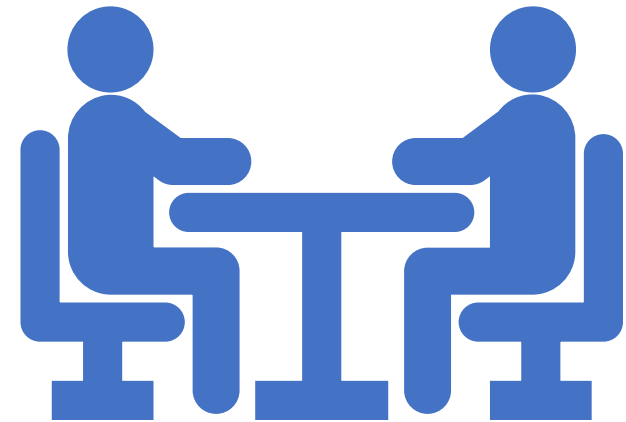


Communications Practices with City Manager or Administrator

- Communicate with the City Manager/Administrator on all Matters Related to Operations
 - Identify the best methods for communication
- Periodic Updates from City Manager/Administrator, Communications, or Public Safety Personnel to Council/Board Members
- Agenda Review Sessions
- One-on-One Meetings, as needed

Communications Practices with City Clerk, City Attorney, and Staff

- Identify and Share Communications Practices to Connect with the...
 - City Clerk
 - City Attorney
 - Staff



Communications Practices Between City Council/Board Members

The Brown Act

- The California open meeting law the “Brown Act” applies to meetings of local legislative bodies
- Meetings or discussions among a quorum of City Council/Board Members will generally violate the “Brown Act” if any matter that is within the subject matter jurisdiction is discussed
- Meetings are not limited to face-to-face and can include communication via telephone, text message, social media postings, etc.
 - The Brown Act was amended to include provisions related to public officials’ use of social media

Communications Practices While Serving on Regional Boards and Ad-hoc Committees

- Active participation by Council/Board Members on regional boards and ad-hoc committees ensures the agencies interests are represented
 - Commitment to regular meeting attendance and knowledge of agenda items is important
 - Identify alternates
- Council/Board Members should report on important discussions and actions from regional agencies they serve at public meetings (agendize accordingly)



Overview of Departments and Other Service Providers

- Department Head/Manager Introductions
- Get To Know the Departments and What They Do
- Identify Service Providers and Partners



Overview of Departments



Rancho Cordova Police
(Contract)



Building & Safety



Public Works (Streets, Roads
& Drainage Maintenance,
Capital Improvements)



Planning & Housing



Economic Development



Finance (Risk Management)



City Clerk, Administrative
Support, Human Resources



Innovation & Information
Technology



Communications &
Legislative Support
(Community Engagement)



Neighborhood Services
(Code Enforcement &
Animal Services)

City Clerk's Office Overview

Open Government – Public Meetings to Conduct Business

- Agenda Management
 - Meeting schedule
 - Regular meetings, special meetings, emergency meetings, and adjourned meetings
 - Parliamentary procedure (e.g. Robert's Rules of Order, Rosenberg's Rules of Order)
 - Ralph M. Brown Act
 - Technology and council chambers operations

City Clerk's Office Overview (continued)

Compliance

- Political Reform Act
 - Conflict of Interests
 - Campaign Financing
 - Ticket Policy and process
- Public Records Act and process
 - Records retention policy
 - Public records request process
- Use of agencies equipment for campaigning/personal use

Council Time Commitments

- Meetings
- Conferences and training
- Events
- Ribbon cuttings
- Responding to the public

Onboarding with IT and HR (Possible Ideas)

Information Technology

- Laptop, tablet, desk phone, cell phone, etc.
- Set up email
 - City email policy
- Bring Your Own Device (BYOD) policy
- Training on software (team effort)

Human Resources

- Access to building
 - Badge access
 - Building security
- Designated parking area
- Office/Desk space
- Remote work policy
- Paperwork (e.g. benefits, etc.)
- Timesheet
- Staff phone directory
- Workplace injury

Other Possible Service Providers



COUNTY



FIRE DISTRICT



**RECREATION AND
PARK DISTRICT**



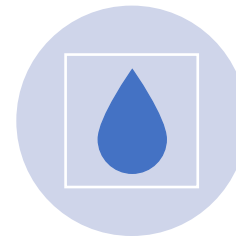
**SCHOOL
DISTRICTS**



**SOLID WASTE
CONTRACTOR**



SEWER DISTRICT



**WATER
PROVIDERS**

Best Practices Discussion

Activity: At each table, share some of your best practices for onboarding new members.

We want to hear your suggestions.



LET'S TALK

Assign a Buddy or Mentor

- Pair New Council/Board Member with Experienced Members Who Can Guide Them
 - Processes, answer questions, and provide insight into culture and best practices.
 - Anyone try this?
 - How has it worked?

Auxiliary or Administrative Support

- Conference and travel coordination
- Event invites and RSVPs
- Ticket distribution
- Discretionary fund requests and processing
- Reimbursements (mileage and some expenses)
- Scheduling requests
 - Speaking requests
 - Meetings
- Business cards
- Incoming mail
- Proclamation requests
- Ceremonial resolutions
- Website updates
- Media training

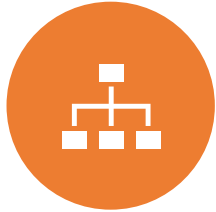


Important Upcoming Dates

- Holiday Schedule
- Council/Board Meeting Schedule
- Meetings with Staff (e.g. City Manager, City Attorney, IT, HR, Departments, etc.)
 - Overview of budget/finance, key projects, and development areas
- Possible Tours
 - City Hall, public safety operations, and other facilities
- Ride-along with Staff
- Special Events
- League of California Cities: Mayor and Council Member Academy
 - Wednesday, January 22 – Friday, January 24, 2025



Provide Key Resources and Materials



**ORGANIZATIONAL
CHART**



**BOARD
MANUAL**



**FINANCIAL
REPORTS**



MAPS



**MEETING
SCHEDULE**



**CAPITAL
IMPROVEMENT
PLAN**



**RULES OF
PROCEDURE**



**CAL CITIES
DOCUMENTS**

THANK YOU!

Mindy Cuppy, MMC
mcuppy@cityofsacramento.org

Stacy Leitner, CMC
sleitner@cityofranchocordova.org
