HANDBOUTS FOR

“What Happens Before & After an Election”

with speakers

Jannette Goodall, TRMC, City Clerk, Austin
& Sherry Mashburn, TRMC, City Secretary, College Station
What Happens Before and After an Election?

SHERRY MASHBURN, TRMC, CITY SECRETARY
CITY OF COLLEGE STATION
JANNETTE GOODALL, TRMC, CITY CLERK
CITY OF AUSTIN

Questions???

Sherry Mashburn
smashburn@cstx.gov
979-764-3541

Jannette Goodall
jannette.goodall@austintexas.gov
512-974-2211

Text questions to either Sherry or Jannette during the session
Sherry @ 512-618-3130
Jannette @ 512-636-4534
Getting Your Ducks in a Row

Preparing your Election calendar
Candidate packets
Obtaining your polling locations
Judges
Recruiting/training election workers

LoveOfLifeQuotes.com
More Ducks

Legislative updates
Articles
Candidate Reminders
Staff assignments for Election Day and Central Count
Outgoing Council Members

Lagniappe

Just little bit extra . . .

Council Basics 101
Candidate Forum
The Unexpected

The dreaded “petition”

Now what?

Certificate of Election
Statement of Elected Officer
Oath of Office
Election Register
## What’s in Your Election Register?

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**Petition for recount**

**Runoff Election**

**Election Contest**
It’s the little things . . .

Profile sheets
Paperwork for HR, if needed
Name Plates, name badges, business cards, City shirt
Council Orientation
Staff celebration for a job well done

You guessed it . . .

It’s time to begin planning for the next election!!
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**NOTES**

- **Canvas Period:** Nov 11 - Nov 13 (18)
- **Runoff Period:** Dec 1 - Dec 31
- **Recount:** 5pm on 5th day after election, or 5th day after canvas, whichever is later
July 14, 2015

To: Candidates for November 3, 2015 General Election

From: Tanya McNutt, Deputy City Secretary

Subject: Election Information Packet for November 3, 2015

The enclosed material contains the following information and forms for the November 3, 2015 General election in the City of College Station:

**Tab 1**
- An election calendar showing relevant dates.
- A memo with important filing information.
- An excerpt from the College Station City Charter, Article IX, Sections 77-83, Nominations and Elections.
- One copy of Application to Place Name on the General Election Ballot (bilingual). The loyalty oath is included on this form and must be signed in the presence of a notary. The application is then filed in my office. It is recommended that the Appointment of Campaign Treasurer by a Candidate (under Tab 2) be filed at this time as well.

**Tab 2**
- 2015 Filing Schedule for Reports Due in Connection with Elections Held on Uniform Election Dates. Video training is now available to those required to file the Candidate/Officeholder Campaign Finance Report – Form C/OH. The training video is approximately 40 minutes in length. Completing this training is voluntary. The Texas Ethics Commission provided this training as a service to those filing Form C/OH with the commission. The video training is available for download by following the instructions at [http://www.ethics.state.tx.us/training/video.htm](http://www.ethics.state.tx.us/training/video.htm) or you can request a DVD of the training by contacting the commission disclosure reports.
- Campaign Finance Guide for Candidates and Officeholders Who File with Local Filing Authorities. This pertains to the filing requirements of campaign expenditure reports. **Please read carefully.**
- Form CTA-Instruction Guide and one copy of Appointment of Campaign Treasurer by a Candidate. This form must be filed before you may accept a campaign contribution or make or authorize campaign expenditure, including an expenditure from your personal funds.
- Form ACTA-Instruction Guide and one copy of Amendment: Appointment of a Campaign Treasurer by a Candidate. This form must be filed if any of the information changes on your original appointment of a campaign treasurer.
Form C/OH-Instruction Guide and one copy of Candidate/Officeholder Report of Contributions, Expenditures, and Loans. This form is to be filed in my office on dates specified on the form. You will need to make copies so that you have one for each filing required. There is a modified reporting statement for those candidates not planning to spend more than $500, which is attached to the Appointment of a Campaign Treasurer by a Candidate (referenced above).

A copy of C/OH Report: Designation of Final Report is to be filed when you are no longer receiving or spending political contributions.

Form C/OH-UC Instruction Guide and one copy of Candidate/Officeholder Report of Unexpended Contributions. This form is to be filed in my office on dates specified on the form.

Tab 3

- Chapter 258, Election Code, Fair Campaign Practices Act, and one copy of Code of Fair Campaign Practices. Subscription to the Code of Fair Campaign Practices is voluntary; however, you are encouraged to do so. This form may be filed upon submission of the campaign treasurer appointment form.
- A copy of “Political Advertising – What you Need to Know” from the Texas Ethics Commission, and A Short Guide to the Prohibition Against Using Political Subdivision Resources for Political Advertising in Connection with an Election.
- TXDOT Rules for Posting Campaign Signs.
- Excerpt from City of College Station Code of Ordinances, Chapter 12, Article 7.5.

Tab 4

- Title 15, Election Code, Regulating Political Funds and Campaigns

It is the duty of the candidate to become familiar with the law applicable to campaigns for office. While the candidates may certainly expect the City Secretary to be able to advise them when reports are due, the duty of the City Secretary is limited to accepting and filing the various applications, affidavits, and statements, and noting the date and time of filing thereon. The City Secretary should not be expected to judge or comment upon the timeliness or sufficiency of reports filed. These documents are public records and are open for inspection by any person.

If you have further questions as you conduct your campaign, please feel free to contact the City of College Station City Secretary’s Office at 979-764-3541; tmcnutt@cstx.gov or smashburn@cstx.gov. We look forward to meeting you and wish you the best of luck in your campaign endeavors.

Tanya McNutt
Deputy City Secretary
City of College Station, Texas
City Council Basics 101

City of College Station, Texas

Sherry Mashburn, TRMC, MMC
Number, Selection, Term

- Mayor and Councilmembers – Places 1, 2, 3, 4, 5, 6
- Elected At-Large for staggered three (3) year terms
- No term limits, but may not serve for consecutive regular terms totaling more than six (6) years
- Election of Places 1, 3, and 5 will take place one year; Places 4 and 6 the following year, and Place 2 and Mayoral election the subsequent year
- Must receive majority (50% +1) of the votes
- **Forfeiture of Office**
  - Fails to maintain the qualifications required by Charter
  - Convicted of a felony while in office
  - Absents him/herself from three (3) consecutive regular City Council meetings without consent of the Council
Powers Conferred by Charter

- To appoint and remove City Manager
- To establish administrative departments and establish the organization and functions of divisions
- To adopt the budget of the City
- To authorize the issuance of bonds by a bond ordinance
- To inquire into the conduct of any office, department or agency of the City and make investigations as to municipal affairs
● To provide for a planning commission, zoning commission and a zoning board of adjustment, and appoint the members of all such commissions and boards

● To adopt plats

● To adopt and modify the official map of the City

● To adopt, modify and carry out plans proposed by the planning commission for the replanning, improvement and redevelopment of neighborhoods or any area or district which may have been destroyed
● To adopt, modify and carry out plans proposed by the planning commission for the replanning, improvement and redevelopment of neighborhoods or any area or district which may have been destroyed in whole or part by disaster

● To regulate, license and fix the charges or fares on any vehicle used for hire on public streets or alleys of the City

● To provide for the establishment and designation of fire limits

● To prevent construction and use of housing below standards fixed by the City Council
Role of the Mayor in the Community

• The Mayor is the ceremonial head of the City government, and as such is the “face” the community expects to see. The Mayor fulfills this role in various ways.
Responsibilities of the Mayor

- Shall be presiding officer at all meetings
- Vote upon all matters, but have no power to veto
- Preserves order and decorum and manages meetings
- Mediates conflict among Council members
When authorized by City Council, the Mayor signs all official documents:

- Ordinances
- Resolutions
- Conveyances
- Grant agreements
- Official plats
- Contracts
- Bonds
The Mayor Pro Tem

- **Responsibilities of the Mayor Pro Tem**
  - Act as Mayor during the disability or absence of the Mayor
  - In this capacity shall have the rights conferred upon the Mayor
Duties of Councilmembers

- Duty to vote on every question decided at Council meetings
- Right to speak, make motions, introduce new ordinances and amendments to existing ones when recognized by the Mayor
• **Council meeting commitments**
  - Be at meetings on time and plan to attend all meetings
  - Be prepared - read agenda packet prior to meeting
  - Be committed to be fair, unbiased and open minded
  - Be involved and visible in the community and its activities

• **Council etiquette**
  - Be courteous to each other and to the staff
  - Be conscious of body language
Council Meetings

- Shall meet regularly, but not less frequently than once each month
- Second and Fourth Thursdays of each month at 7:00 pm
- Special meetings subject to call by the Mayor or a majority of members of the Council
- In order to conduct business, there must be four (4) members of council present – constituting a quorum
- Councilmembers may remote site in
- **Council meetings**

  - Reporting absences to the Mayor in a timely manner to address meeting quorum requirements

  - Conducted in accordance with Chapter 551 of the Texas Government Code, the Texas Open Meeting Act, and Chapter 552 of the Texas Government Code, the Texas Public Information Act
Every meeting of the city council must be conducted in accordance with Chapter 551 of the Government Code, the Texas Open Meetings Act.

Any person taking office after January 1, 2006 is required to complete training no later than 90 days after taking the oath of office or assumes the responsibilities of the office.

A time will be set with new councilmembers to meet this requirement.
The Open Meetings Act requires a written notice (agenda) of the date, hour and location of every council meeting, together with an agenda specifically describing all of the items to be considered.

The notice/agenda must be posted 72 hours in advance of such meeting on a bulletin board at city hall accessible to the public day and night.

In addition, the Act requires a city that maintains an Internet website to post meeting notices on its website.
Executive Sessions

- Are permitted for the discussion of items that legitimately fall within the confines of statutorily defined exceptions.

- Before an executive session can take place, the council must first convene in open session; the presiding officer must announce that a closed meeting will take place and must cite the section of the Open Meetings Act that authorizes the closed session.
Open meeting law expressly provides that no final action, decision or vote can be made except in a meeting that is open to the public.

Any councilmember that violates the Open Meeting law:
- can be punished by a fine of $100.00 to $500.00
- confinement in the county jail for one to six months
- or both
• Actions taken by a council in an illegal meeting are voidable, and a court may assess costs of litigation and reasonable attorney’s fees incurred by a party who substantially prevails in action brought under the open meeting law.

• It is an affirmative defense to prosecution if the Mayor or Councilmember relied, in good faith, on the written advice of the city’s attorney.
There are ten narrow exceptions to the Open Meetings Act:

1) Consultation with Attorney
2) Deliberation Regarding Real Property
3) Deliberation Regarding Prospective Gift
4) Personnel Matters
5) Deliberation Regarding Security Devices
6) Agency Financed by Federal Government
7) Exclusion of Witness from Hearing
8) Meeting Concerning Municipally Owned Utility
9) Deliberation Regarding Economic Development Negotiation
10) Deliberation Regarding Test Item
Local Gov’t Code 171 – Conflict Disclosure

Every time a local public official participates in contracting with his governmental entity or owns real property that may be affected by that entity’s actions, the official must consider whether his discussion, decision or vote on an item will violate either Texas conflict of interest laws or local conflict of interest provisions.
What types of issues are covered by Texas conflict of interest laws?

1) Business Entity Conflicts
2) Real Property Conflicts
What is the definition of a “business entity” for purposes of the conflict of interest laws?

For purposes of Texas conflict of interest laws, a “business entity” includes:

sole proprietorships; partnerships, firms, corporations, holding companies, joint-stock companies, receiverships, trusts, and any other entity recognized by law as a business entity
What is considered a “substantial interest” in a business entity (such that it would amount to a potential conflict of interest)?

1) Stock Interest
2) Other Ownership Interest
3) Income Interest
4) Close Family Member with any of the Above Interests
What is considered a “substantial interest” in real property (such that it would amount to a potential conflict of interest)?

There are two ways that a person could be deemed to have a “substantial interest” in “real property”

1) A $2,500 Ownership Interest in the Real Property:

2) A Close Family Member with a $2,500 Ownership Interest in the Real Property

LGC 171.002
What actions must a local official take if the official has a conflict of interest under chapter 171?

File an Affidavit

Abstain from Discussion

Abstain from Voting
May a local entity separate out an item from a budget to allow the official with the conflict to vote on the budget?
May a person be charged with a crime if the official violates the conflict of interest laws?

1) Failure to file an Affidavit noting a conflict

2) Participating in discussions regarding an item for which there is a Conflict

3) Serving as a Surety for certain businesses

4) Serving as a Surety for Local Official Bonds
Political Leadership

- View the public interest apart from personal interests
- Set policies and goals as a team
- Develop public policy
Policy Development

• The process of making decisions regarding
  • **Where** the city is going
  • **How** it should get there
  • **What** problems the city faces
  • **How** will the council solve these problems
  • **When** should problems be solved
  • **Is** it based on a comprehensive plan and council goals
Four (4) steps to achieve policy decisions:

- Determine what is needed
- Determine the will of the people
- Determine what can be done financially and practically
- Make a decision and take action
Does staff have a role in the policy development?

YES!
Understanding Roles of C/M Form of Government

Mission

- Council’s Sphere – Determine “purpose,” scope of services, tax level, constitution issues
- Manager’s Sphere – Advise (what City “can” do may influence what it “should” do); analyze conditions & trends
Understanding Roles of C/M Form of Government

Policy

- Council’s Sphere – Pass ordinances; approve new projects & programs; ratify budget
- Manager’s Sphere – Make recommendations on all decisions; formulate budget; determine service distribution formula
Understanding Roles of C/M Form of Government

Management

- Council’s Sphere – Review organization’s performance in manager’s appraisal
- Manager’s Sphere – Control the human, material & informational resources of organization to support policy & administrative functions

From *The Effective Local Government Manager* by Charldean Newell
City Council / Staff Relations

- Policy vs. Administration Roles
- Team Approach
- CC / staff members need to be sensitive to balance between casual & formal relationships
- CC members have no individual authority / Staff sees Council as “singular, not plural”
Critical Issues

- Budget challenges still exist
- Controlling the rising cost of providing services
- Minimizing effects of national economic climate
- Maintain/improving capacity for our infrastructure
- Maintain competitive employee benefits
- Diversifying our local economy
- Addressing future capital needs
- Other
City Plans You Should Know:

- Comprehensive Master Plan
- Transportation Plan
- Parks, Recreation, Trails & Open Space Master Plan
- Capital Improvement Plan
- Water/Wastewater Master Plan

Just to name a few

“To make a great dream come true, you must first have a great dream.” – Hans Selye
“The art of government is conducting business in such a manner as to satisfy the irritated without irritating the satisfied.”
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<td>Linda Harvell</td>
<td>1,814</td>
<td>1,750</td>
<td>3,564</td>
<td>10.49%</td>
<td></td>
<td>Ord 2013-3534</td>
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<td></td>
<td></td>
<td></td>
<td>Nancy Berry</td>
<td>1,209</td>
<td>2,067</td>
<td>3,276</td>
<td>10.75%</td>
<td>448</td>
<td></td>
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<td></td>
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<td>Place 2</td>
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<td>Gary Ives</td>
<td>320</td>
<td>609</td>
<td>929</td>
<td>25.21%</td>
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<td></td>
<td>Steve Aldrich</td>
<td>1,063</td>
<td>1,727</td>
<td>2,790</td>
<td>10.49%</td>
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<td>Ord 2012-3460</td>
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<tr>
<td>11/6/2012</td>
<td>97,502</td>
<td>41,409</td>
<td>Place 4-cancelled</td>
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<td>John Nichols</td>
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<td>Place 6-cancelled</td>
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<td></td>
<td>James Benham</td>
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<td>For</td>
<td>9,370</td>
<td>5,658</td>
<td>15,028</td>
<td>60.14%</td>
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<td></td>
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<td>Against</td>
<td>2,298</td>
<td>1,297</td>
<td>3,595</td>
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</tbody>
</table>
PROFILE SHEET
This information is for the CSO only and will not be released to the public unless otherwise noted.

NAME__________________________________________________________________

HOME ADDRESS________________________________________________________

HOME PHONE____________________  HOME FAX___________________________

CELL PHONE___________________________________________________________

HOME EMAIL ADDRESS_________________________________________________

PLACE OF BUSINESS____________________________________________________

BUSINESS PHONE________________  BUSINESS FAX________________________

BUSINESS EMAIL ADDRESS______________________________________________

TITLE____________________________  ASSISTANT________________________

HOW DO YOU PREFER TO BE CONTACTED BY STAFF?_______________________

HOW DO YOU PREFER TO BE CONTACTED BY THE PUBLIC?__________________

ANY SPECIAL INSTRUCTIONS?___________________________________________

________________________________________________________________________

________________________________________________________________________

WHAT CAN WE DO TO BETTER SERVE YOU?______________________________

________________________________________________________________________

________________________________________________________________________

PERSONAL INFORMATION

SPOUSE_________________________________________________________________

CHILDREN (AGE)_______________________________________________________

BIRTHDAY_______________________  ANNIVERSARY DATE_________________

FAVORITE DESSERT______________________________SHIRT SIZE____________
# New Council Member Orientation
**Monday, June 8, 2015**
**Agenda Day 1**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Description</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 – 9:30</td>
<td>City Manager</td>
<td>Wayne J. Sabo, City Manager</td>
</tr>
<tr>
<td>9:30 – 10:00</td>
<td>Human Resources</td>
<td>Sue Gallagher, Dir. Human Resources</td>
</tr>
<tr>
<td>10:00 – 11:00</td>
<td>Economic Development</td>
<td>Dr. Betsy Giusto, Dir. Economic Development</td>
</tr>
<tr>
<td>11:00-1:30</td>
<td>Lunch Space Center Houston</td>
<td>Derhyl Hebert, Dir. Community Development</td>
</tr>
<tr>
<td>1:30-3:00</td>
<td>Community Development</td>
<td>Pauline Small, TRMC, MMC, City Secretary</td>
</tr>
<tr>
<td>3:00-4:30</td>
<td>City Secretary</td>
<td>Patrick Shipp, Fire Chief</td>
</tr>
<tr>
<td>4:30-5:30</td>
<td>Fire</td>
<td>Times may vary slightly</td>
</tr>
</tbody>
</table>
New Council Member Orientation  
Tuesday, June 9, 2015  
Agenda Day 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 – 11:00</td>
<td>Administration and Finance</td>
<td>Mike Rodgers. Director Administration and Finance</td>
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<tr>
<td></td>
<td>• Budget</td>
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<td>• Financial Reports</td>
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<td>• IT</td>
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<td></td>
<td>• Court</td>
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<td>11:00-11:30</td>
<td>Police</td>
<td>Daniel Presley, Chief of Police</td>
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<td>• 911 Call Center</td>
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<td>• Organizational Structure</td>
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<td></td>
<td>• Division Functions</td>
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<tr>
<td>11:30-12:00</td>
<td>Emergency Management</td>
<td>Joe Ferro, Emergency Management Coordinator</td>
</tr>
<tr>
<td></td>
<td>• Tour of Emergency Operations Center</td>
<td></td>
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<tr>
<td>12:00-1:00</td>
<td>LUNCH</td>
<td></td>
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<tr>
<td>1:00-3:00</td>
<td>Public Works</td>
<td>Shannon Hicks, Dir. of Public Works, City Engineer</td>
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<td>• Water/Wastewater</td>
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<td>• Tour of Treatment Plant</td>
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<td></td>
<td>• Tour of Edgewater</td>
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</tr>
<tr>
<td>3:00-4:00</td>
<td>Wrap Up Council Chambers</td>
<td>Mayor Rogers</td>
</tr>
</tbody>
</table>

*Times may vary slightly*
MEMORANDUM

TO: Candidates for the 2016 City Council Election
FROM: Jannette Goodall, City Clerk
DATE: May 6, 2016
SUBJECT: Election Information

The Candidates Guide is a packet containing important information and forms for anyone interested in running for the Austin City Council. The five Council seats on the November 8, 2016 ballot are from District 2, 4, 6, 7 and 10. Article II, Section 2 of the City Charter specifies the eligibility requirements to serve on Council. The requirements to serve as a City Council Member are:

- Must meet all eligibility requirements listed in the Texas Election Code, Section 141.001; and
- Must have resided continuously in the state for 12 months and in the council district from which the candidate is seeking election for six months immediately preceding the regular filing deadline for the application for a place on the ballot.

The regular filing deadline for the application for a place on the November 8, 2016 ballot is Monday, August 22, 2016 at 5 PM. Based on the filing deadline and the eligibility requirements, the relevant residency deadlines are:

- Resident of the state as of August 21, 2015; and
- Resident of the respective council district as of February 21, 2016.

The Candidates Guide and all relevant forms are available on-line at http://austintexas.gov/page/elections-2016. Forms that were not created by the City of Austin have been downloaded from the appropriate website. The forms were current as of April 22, 2016; however candidates should be aware that it is possible that the Secretary of State or the Texas Ethics Commission may update their forms without notice. Prior to using a form contained in the Guide, you should compare the date of the form in the Guide with the date of the form currently posted on the appropriate State agency website. The web address for each form included in the Guide is listed in the Table of Contents immediately below the name of the form. While the Candidates Guide has provided website links published in both English and Spanish, the destination website may or may not contain Spanish translations.

The Guide also provides new instructions on the City requirements for electronic filing of Campaign Finance data as required by City Code. Section 2-226 states that “A candidate, officeholder, or political committee required by the City Code or state law to file a campaign finance report with the city clerk shall, in addition to the required report, also provide to the city clerk a structured data file containing the contents of the campaign finance report.” Additional instructions and forms are provided in the Guide in the section relating to campaign finance or the City web site at http://austintexas.gov/page/campaign-finance-forms.

The duty of the City Clerk’s Office is to accept, retain and provide access to the election documents including the application for place on the ballot and campaign finance documents. The Office is not responsible for providing campaign advice or completing, correcting or ensuring the timeliness or
accuracy of the documents filed. Election law, especially campaign finance law is complex. For this reason, a candidate may want to consider retaining legal counsel or an experienced campaign manager to assist you during your campaign. A candidate may direct specific questions to the City Clerk’s Office or request a meeting with staff to discuss specific questions. Where ever possible the staff will assist you in either determining the answer or direct you to the correct State agency for a response.
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http://www.austintexas.gov/edims/document.cfm?id=252204

TAB 1 - General Information

Election Calendar
http://www.austintexas.gov/edims/document.cfm?id=246112

Runoff Election Calendar
http://www.austintexas.gov/edims/document.cfm?id=252209

Public Information Requests Memo

Sign Regulations
http://www.austintexas.gov/edims/document.cfm?id=250286

Recycling Campaign Signs
http://www.austintexas.gov/edims/document.cfm?id=250287

Sign Regulations – Facts About Illegal Right-Of-Way Signs
http://www.austintexas.gov/edims/document.cfm?id=250504

Pamphlet on Political Advertising – What you Need to Know
http://www.austintexas.gov/edims/document.cfm?id=250288

Pamphlet on Texas Ethics Commission
http://www.austintexas.gov/edims/document.cfm?id=250289

City and District Maps
http://www.austintexas.gov/edims/document.cfm?id=252710

TAB 2 - Campaign Finance

Annual Adjustment of Campaign Finance Limits
http://www.austintexas.gov/edims/document.cfm?id=252205

Appointment of A Campaign Treasurer by a Candidate Form CTA
https://www.ethics.state.tx.us/forms/ct.pdf

Appointment of A Campaign Treasurer by a Candidate Form CTA-Instruction Guide
https://www.ethics.state.tx.us/forms/CTA_ins.pdf

Amendment: Appointment of a Campaign Treasurer by a Candidate Form ACTA
www.ethics.state.tx.us/forms/acta.pdf

Amendment: Appointment of a Campaign Treasurer by a Candidate – ACTA-Instruction Guide
www.ethics.state.tx.us/forms/ACTA_ins.pdf

Code of Fair Campaign Practices Form CFCP
http://www.ethics.state.tx.us/forms/cfcp.pdf
Candidate Contract
http://www.austintexas.gov/edims/document.cfm?id=208012

Candidate and Officeholder Brochure
http://www.austintexas.gov/edims/document.cfm?id=252205

Candidate/Officeholder Campaign Finance Report Form C/OH
https://www.ethics.state.tx.us/forms/coh.pdf

Correction Affidavit for Candidate/Officeholder Form COR-C/OH
https://www.ethics.state.tx.us/forms/2cor_coh.pdf

Candidate/Officeholder Campaign Finance Report Form C/OH - Instruction Guide
https://www.ethics.state.tx.us/forms/C/OH_ins.pdf

Schedule ATX 1 – Direct Election Expenditures
http://www.austintexas.gov/edims/document.cfm?id=252254

Schedule ATX 1 – Direct Campaign Expenditures – Instruction Guide
http://www.austintexas.gov/edims/document.cfm?id=252269

Schedule ATX 5 - Bundling Report
http://www.austintexas.gov/edims/document.cfm?id=252263

Schedule ATX 5 - Bundling Report Instruction Guide
http://www.austintexas.gov/edims/document.cfm?id=252266

Schedule ATX 6 – Exemption Statement
http://www.austintexas.gov/edims/document.cfm?id=252265

Schedule ATX 7 – Pre-Election Report - Candidates
http://www.austintexas.gov/edims/document.cfm?id=252261

Schedule ATX 7 – Pre-Election Report - Candidates Instruction Guide
http://www.austintexas.gov/edims/document.cfm?id=252267

Schedule ATX 7 – Pre-Election Report – Politica. Action Committees
http://www.austintexas.gov/edims/document.cfm?id=252262

http://www.austintexas.gov/edims/document.cfm?id=252268

2016 Filing Schedule
http://www.austintexas.gov/edims/document.cfm?id=252272

TAB 3 – Electronic Filing Requirements

Memo on Electronic Filing Reporting Requirements
http://www.austintexas.gov/edims/document.cfm?id=252216

Electronic Filing of Campaign Data Information Sheet
http://www.austintexas.gov/edims/document.cfm?id=252217
TAB 4 - Applying for a Place on the Ballot

Requirements to be a registered voter Memo
http://www.austintexas.gov/edims/document.cfm?id=252218

Application for a Place On The City of Austin General Election Ballot
http://www.austintexas.gov/edims/document.cfm?id=252274

Petition for a Place On The City General Election Ballot
www.sos.state.tx.us/elections/forms/pol-sub/2-18f.pdf

Continuation Page for Petition for a Place On The City General Election Ballot
http://www.austintexas.gov/edims/document.cfm?id=250292

Instructions on Filing a Petition for a Place on the Ballot
http://www.austintexas.gov/edims/document.cfm?id=250290

TAB 5 - Personal Financial Information

Statement of Financial Information Form
http://www.austintexas.gov/edims/document.cfm?id=250295

Personal Financial Statement Form PFS
http://www.austintexas.gov/edims/document.cfm?id=252276

Personal Financial Statement Form PFS-Instructor Guide
https://www.ethics.state.tx.us/forms/PFS_ins.pdf

Corrected Financial Statement and Good-Faith Affidavit (To be used for Form PFS)
https://www.ethics.state.tx.us/forms/2cor_pfs16.pdf

Texas Nepotism Chart
http://www.austintexas.gov/edims/document.cfm?id=252200

TAB 6 – Unexpended Contributions

Candidate/Officeholder Report of Unexpended Contributions Form C/OH-UC
https://www.ethics.state.tx.us/forms/coh_uc.pdf

Candidate/Officeholder Report of Unexpended Contributions Form C/OH-UC - Instruction Guide
https://www.ethics.state.tx.us/forms/COHuc_ins.pdf

TAB 7 – Appendix

Austin City Code, Charter, Article II, Section 2, Eligibility of Council Members
https://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=CH_ARTIITHC O_S2ELCOME

Austin City Code, Charter, Article II, Section 5 Term Limits
https://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=CH_ARTIITHC O_S5ELLI

Austin City Code, Charter, Article III, Section 8, Limits on Campaign Contributions and Expenditures
https://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=CH_ARTIIEL_ S8LICACOEXAustin City Code
Chapter 2-2, Campaign Finance
https://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=T1T2AD_CH2-2CAFI

Austin City Code, Chapter 2-7 Ethics and Financial Disclosure
https://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=T1T2AD_CH2-7ETFDID

Austin City Code, Chapter 25-10-103 Signs Prohibited in Public Right-of-Way

Ordinance 20160407-006, Campaign Finance
http://www.austintexas.gov/edims/document.cfm?id=252277

ADDITIONAL ELECTION RESOURCES
(Not included in this packet)

Appointment of Poll Watcher By Candidate On The Ballot Or Declared Write-In Candidate
www.sos.state.tx.us/elections/forms/pol-sub/b4-16f.pdf

Campaign Finance Guide For Candidates And Officeholders Who File With Local Filing Authorities
www.ethics.state.tx.us/guides/coh_local_guide.pdf

Title 3, Election Code, Chapter 33 - Watchers, Subchapter A. Appointments
www.statutes.legis.state.tx.us/Docs/EL/pdf/EL.33.pdf

Title 9, Election Code, Chapter 141 - Candidacy For Public Office Generally, Subchapter C. Petition
www.statutes.legis.state.tx.us/Docs/EL/pdf/EL.141.pdf

Title 15, Election Code, Chapter 255 - Regulating Political Advertising And Campaign Communications
www.statutes.legis.state.tx.us/Docs/EL/pdf/EL.255.pdf
To: Council Member-Elect  
From: Jannette Goodall, City Clerk

Congratulations on being elected to represent District 10. The Office of the City Clerk is excited to begin working with your office. To assist you during the transition, we are providing you with information which may be helpful between now and January 6.

Each elected or appointed member of a governmental body must complete training on the Open Meetings Act. Please visit the Texas Attorney General's Web site at https://www.texasattorneygeneral.gov/open/og_training.shtml to access the on-line training video. At the end of the training, instructions will be provided on how to download and print your completion certificate. A copy of the completion certificate must be filed with the City Clerk’s Office. The training must be completed within 90 days of being elected.

The Attorney General’s Office also provides a one-hour on-line training on the Public Information Act. The City has designated staff to serve as the public information coordinator for Council; therefore the training is not required. However, if you are not familiar with the requirements of the Public Information Act, I would encourage you to consider taking the on-line training which can be accessed at the website listed above.

Council Inauguration is scheduled for January 6, 2017 at 6:00 PM at City Hall. The inauguration is open to the public; however we will have reserved seating for guests of each Council Member. Additional information about the inauguration will be sent out by the end of the week. However, Council Members should arrive at City Hall by 5:00 p.m. Upon arrival, please check in with Myrna Rios, Assistant City Clerk for instructions, signatures on required forms, etc. After the swearing in ceremony, Council will convene a Special Called Meeting to elect a Mayor Pro Tem.

The Clerk’s Office will be sending you a list of the current Council Committees and other intergovernmental entities for which the City has an appointment, so that you may begin identifying possible committees or boards that you are interested in serving on. The Mayor’s Office will coordinate the appointment process between the Council Offices with the final appointments being approved by Council Resolution. You may obtain additional information about each of these entities by visiting the Council Meeting Information Center at http://www.austintexas.gov/department/city-council/council-meetings. Additional information including past agendas and minutes may be found by clicking on the tabs to the left of the page for “Committees of Council”, “Council Corporations”, and “Intergovernmental Entities”.

The Office of the City Clerk will schedule a time to discuss Board and Commission appointments, proclamations and administrative support services provided by our office including payroll processing, ordering supplies, etc. In addition, before the first Council Meeting, we will schedule time to review the equipment on the dais which is used during the Council Meetings.

We look forward to working with each Office. Please let Myrna Rios or myself know if you have questions or if we can be of any assistance. We can be reached at 512-974-2210.
<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Description</th>
<th>Outcomes</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00 – 1:15</td>
<td>Welcome</td>
<td>Participants arrive and welcome is given</td>
<td>Participants get acquainted with each other &amp; facilitators</td>
<td>ACM SPOC(s)</td>
</tr>
<tr>
<td>1:15 – 1:45</td>
<td>Meet your Onboarding Team</td>
<td>Council offices introduce themselves and their role. Onboarding Team introduces themselves and provide their role moving forward</td>
<td>Participants learn their onboarding team and who to contact.</td>
<td>Jason Alexander, Facilitator HRD, CTM, Building Services/Security, CPIO, Kay Guedea, Budget</td>
</tr>
<tr>
<td>1:45 – 2:15</td>
<td>New Employee Paperwork and Benefits Discussion</td>
<td>Debbie Gass &amp; Karen Haywood/Lisa Herrera discuss new employee paperwork and Benefits</td>
<td>Council Offices finalize the paperwork needed (Tax documents; emergency contact; I9) Benefit information is discussed and paperwork given; Ask if they want further information on: Empower, Velocity, Retirement</td>
<td>Council Offices HRD</td>
</tr>
<tr>
<td>2:15 – 2:45</td>
<td>Hiring Staff Council Pay Structure</td>
<td>Debbie Gass/Beth Bertin discuss how to hire at the city; Debbie Gass reviews council pay structures, including Performance Enhancement Pay and deferments of authorized pay increases</td>
<td>Council Offices learn who to contact and how to onboard staff Council Offices learn about pay plans needed and how to defer increases, if requested</td>
<td>Council Offices HRD</td>
</tr>
<tr>
<td>Break</td>
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<tr>
<td>3:00 – 3:30</td>
<td>Office Budget Discussion</td>
<td>Lauren Brumley reviews the Council office budget and what is included in each office.</td>
<td>Council Offices learn how the budget for their office is impacted by personnel and other project decisions. (Briefly provide macro context of overall City budget)</td>
<td>Council Offices Budget</td>
</tr>
<tr>
<td>3:30 – 4:00</td>
<td>Travel and Other Arrangements</td>
<td>Kay Guedea reviews her role in supporting Council Offices</td>
<td>Council Offices provide any items needed to facilitate their travel, dietary restrictions, etc.</td>
<td>Council Offices Kay Guedea</td>
</tr>
<tr>
<td>4:00 – 4:30</td>
<td>Overview of Org Structure and Council/Staff Communications</td>
<td>Jason Alexander will review the communications structure and who to contact.</td>
<td>Council Offices learn how to get questions answered on City projects and when to go through the Council Offices.</td>
<td>Council Offices Jason Alexander ACM EAs</td>
</tr>
<tr>
<td>Time</td>
<td>Activity</td>
<td>Description</td>
<td>Learning Outcomes</td>
<td>Presenter</td>
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<tr>
<td>9:00-9:20 AM</td>
<td>Welcome</td>
<td>Coffee &amp; Breakfast Tacos</td>
<td>Camaraderie</td>
<td>All Presenters</td>
</tr>
<tr>
<td>9:20-9:40 AM</td>
<td>Introductions</td>
<td>Kick off meeting</td>
<td>Overview of today's agenda / short icebreaker exercise</td>
<td>Jason Alexander, Asst. to the City Manager</td>
</tr>
<tr>
<td>9:40-10:10 AM</td>
<td>Presentation</td>
<td>Welcoming Remarks, Strategic Direction and Organizational Chart (high level)</td>
<td>What is our vision/mission/values? How is the City organized? How do we navigate the City of Austin? What's a Service Group? Who are my direct reports?</td>
<td>City Manager, Elaine Hart</td>
</tr>
<tr>
<td>10:10-10:40 AM</td>
<td>Presentation (hard copies of Charter)</td>
<td>City Charter</td>
<td>What does the City Charter say about the Council/Manager form of government? What protocols are in place and why? How can we best collaborate?</td>
<td>Anne Morgan, City Attorney</td>
</tr>
</tbody>
</table>
| 10:40-11:40 AM   | Interactive Discussion (scenarios + Q&A)      | Open Government, Transparency, Ethics and the Law, Public Information Requests (PIRs) | - Open Meetings ("walking quorum" and more)  
- What is Executive Session?  
- Ethics in Government (avoiding ethics violations)  
- Public Information Requests (PIRs) | Jerikay Gayle, et al., Law |
| 11:40-12:20 PM   | Lunch                                         |                                                                            |                                                                                   |                                               |
| 12:20-12:45 PM   | Brief Presentation + Fact Sheet               | Council Agendas: How do I get my policy ideas on the table?                 | Council Resolutions -- How do I get an item on a Council agenda? What are the deadlines? What are these other items, like Requests for Council Action and public hearings? | Catie Powers, Agenda Manager                  
Ray Baray, Chief of Staff                       |
| 12:45-1:00 PM    | Presentation + fact sheet of process          | Council Committees                                                         | Council Committees and other committees, such as City Council Transition Work Group and Regional Affordability Committee | Robert Goode, Assistant City Manager          |
| 1:00-1:15 PM     | Brief Presentation + fact sheet               | Council Appointments to Boards and Commissions, Council Participation on External Boards | Council Appointments to Boards and Commissions and Council Participation on External Boards | Clerk's Office                                |
| 1:45-2:00 PM     | Break                                         |                                                                            |                                                                                   |                                               |
| 2:00-2:45 PM     | Brief Presentation w/ visual aides            | What Makes up a City Budget?                                                | What's in the budget? How is it crafted each year? What do departments consider when making funding decisions? How can I make improvements? | Ed Van Eenoo, Budget Office                   |
| 2:45-3:15 PM     | Presentation with infographic/cheat sheet     | Zoning 101                                                                 | Understanding the process of zoning from application, through PC & ZAP (& what's the difference), to Council. High level overview of CodeNEXT significance. | Greg Guernsey, Planning & Zoning Director     |
| 3:15-3:30 PM     | Brief Announcement                            | Preview: Training Opportunities                                             | Preview upcoming learning and training opportunities available to Council and aides. Collect feedback. | Sheila Balog / Lara Foss                      |