CITY OF

BRADENTON BEACH

Gail Loeffler

From: Mayor William Shearon [mayor@cityofbradentonbeach.com]
Sent: Friday, August 19, 2016 1:02 PM
To: Gail Loeffler
Subject: Re: Request for information re: orientation of newly elected Commission/Council members

Gail,

We need this training opportunity as we have NO orientation process or education. Last two elections commissioners only attended a couple of meetings for Sunshine. A local training class would be beneficial.

Mayor Bill Shearon
107 Gulf Drive North
Bradenton Beach, Florida 34217
941-737-0159
mayor@cityofbradentonbeach.com

From: Gail Loeffler
Sent: Thursday, August 18, 2016 1:44:23 PM
To: Anna Maria (amclerk@cityofannamaria.com); diane.taylor@sarasotagov.com; Gail Loeffler; Heather Taylor (HTaylor@Venicegov.com); jgamel@ci.venice.fl.us; Jo Ann Mixon; Lorraine Anderson (landerson@venicegov.com); padkins@cityofnorthport.com; Penny Johnston; Rene Raymond (Rene.Raymond@cityofbradenton.com); Stacey Johnston (cityclerk@holmesbeachfl.org); Terri Sanclemente (City Clerk); Trish Granger; Pamela Nadalini
Cc: Mayor William Shearon; Brian Williams - City of Palmetto (BTWFAMILY@verizon.net); bwilliams@palmettofl.org; Carol Carter (amcommcarter@cityofannamaria.com); Commissioner Carol Carter (cacarter416@aol.com); Gail Loeffler; Irwin Pastor; Jo Ann Mixon; jpeelen@holmesbeachfl.org; Kit McKeon; kmckeon@ci.venice.fl.us; lyates@cityofnorthport.com; Lynn Larson; Patrick Roff (Patrick.Roff@cityofbradenton.com); Susan Chapman (Susan.Chapman@sarasotagov.com); Trish Granger; willie.shaw@sarasotagov.com
Subject: Request for information re: orientation of newly elected Commission/Council members
The ManaSota League of Cities (MSLC) is requesting from its membership information you would be willing to share about orientation and education programs being utilized for your newly elected Commission/Council members.

Recognizing a need for providing education for new Commission/Council members as soon as possible after elections, it would be helpful to learn what each local municipality has established for the orientation process.

If you have an outline of your orientation procedures or program, would appreciate your providing it to us. The topic is slated for the MSLC agenda of September 8, 2016, for discussion, and would appreciate anything you can share be provided in advance of that date.

If you have questions, please let us know.

Thank you.

Gail Loeffler
Assistant Administrative Coordinator
ManaSota League of Cities

CITY OF

HOLMES BEACH

CITY OF HOLMES BEACH - COMMISSIONER ORIENTATION PROGRAM

The City of Holmes Beach does not have a formal policy for new Commission orientation. However, we do provide them with all appropriate documents such as the Code of Ordinances, Comp Plan, Personnel Manual, phone listing, board listing, etc. As City Clerk, I review the information being provided to each new member. I also review the Sunshine Law, email requirements, etc. Upon election of a new Commissioner, in-house Sunshine and Ethics is taught by our City Attorney. Each Commissioner is also allowed the opportunity to attend the League IEMO training.

In the past, the City has held a Work Session in conjunction with the Sunshine/Ethics training where updates and reports are presented to the Commission from each Department Director.

Hope this information will assist in some way. Please let me know if you would like any additional information.

Stacey Johnston, MMC, City Clerk
FACC Southwest District Director
cityclerk@holmesbeachfl.org
City of Holmes Beach

TOWN OF

LONGBOAT KEY

M E M O R A N D U M

Date: February 19, 2016

TO: Commissioner-Elect Armando Linde

FROM: Trish Granger, Town Clerk

SUBJECT: Records Distribution/Commissioner Information

Congratulations on your appointment to serve as Town Commissioner for District 1.

As a result of your appointment, it is necessary that you complete and return the Form 1, Statement of Financial Interests, to the Supervisor of Elections Office. If you will provide the original, the Town Clerk's office will forward via certified mail to provide a record of the transmittal to the Supervisors' office. If you need assistance, please let me know. The form must be submitted within 30 days of the date of your appointment.

You will be receiving the documents (detailed below) that will assist you in the upcoming months and also provide historical information on several Town Commission policies and processes.

A brief breakdown of the documents follows.

I. Town Code Quick References:
   - A. A Quick Look - "Cans and Cannots" of Charter Powers and Town Charter
   - B. Chapter 30 - Town Commission - pertaining to the Rules and Regulations of the Commission
     Chapter 31 - Officials
     Chapter 32 - Departments and Agencies
   - C. Chapter 39 - Code of Ethics - adopted Code of Ethics for Town Officers
   - D. Chapter 40 - Travel and Reimbursement Policy
   - E. Town Commission Outside Appointments (2015)

II. Quasi-Judicial Proceedings / Ex Parte Communication:
   Correspondence from Town Attorney David Persson, dated September 16, 2009, and a copy of Resolution 95-27 regarding ex parte communications in quasi-judicial matters

III. Public and Electronic Records:
   - A. What Is A Public Record - a brief overview of Florida's public records requirements for government agencies
   - B. Electronic Records - a brief overview of electronic records subject to Florida's public records laws

IV. Ordinances and Resolutions/Miscellaneous Policies:
   - Ordinance 04-20 - Town Commission Rules of Procedure for Conducting Meetings (also included in Chapter 30, Section 30.01.1, of the Town Code)

- Resolution 04-17 - Policy concerning Town Commission appointees
- Resolution 2008-30 - Town Commission E-Mail Policy
- Resolution 2010-17 - Procedures for Appointments to Boards and Committees
- Resolution 2010-21 - Applicability of Partial Terms
- Resolution 2011-33 - Commission Communication Equipment Policy (Phones, i-Pads, other electronic equipment)
- Resolution 2013-33 - Electronic Participation Policy
- Resolution 2014-25 - Town's Investment Policy

V. Vision Plan/Vision and Mission Statement and Core Values

- Resolution 2011-13 - Adoption of the Vision Plan
- Resolution 2011-32 - Adoption of Vision and Mission Statement and Core Values Plan

VI. Solicitation and Acceptance of Gifts:

- Correspondence from Assistant Town Attorney Kelly Martinson relating to solicitation and acceptance of gifts dated April 9, 2010
- Florida Commission On Ethics
  - Memorandum from Florida Commission on Ethics Executive Director Philip Claypool
  - Disclosures Required by Gifts Law

VII. Sunshine Law and Code of Ethics for Public Officers:

- The Sunshine Law: A brief history of the Sunshine Law
- Florida Commission on Ethics: 2016 Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees
- Copy of a Sunshine Law PowerPoint presentation given by Manatee County Deputy County Attorney Robert Eschenfelder

VIII. Miscellaneous:

- Key Municipal Terms and Policies - provided by the Florida League of Cities
- Robert's Rules of Order - Newly Revised, In Brief Reference Book: Per Ordinance 04-20 (separate distribution)
- Florida League of Cities Elected Officials Manual
  http://www.floridaleagueofcities.com/Publications.aspx?CNID=176

The following documents/books will also be provided to you:

Town of Longboat Key - Code of Ordinances - the Code book is updated bi-annually (printed copy) with adopted Ordinances. Any ordinance modifications between printed updates can be viewed through the Town's website (www.longboatkey.org - Select: Town Charter/Code from menu list to view on-line code)

Additionally, the Town Manager's Assistant, Susan Phillips, will be scheduling you for the Florida League of Cities Institute for Elected Officials (IEMO) within

the next few months. Newly elected Commissioners will be scheduled for two IEMO courses prior to the end of your first year in office. These course cover a wide range of topics and will be beneficial to you during your term of office.

The Town Clerk's staff and I look forward to working with you. If you have any questions on procedures or processes, we'll be happy to assist.

CITY OF

NORTH PORT

North Port Commission Handbook

A Guide for New City Commissioners

NorthPort FLORIDA

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Congratulations

Membership on the North Port City Commission is both a challenging and satisfying experience. There is now a huge responsibility that rests on your shoulders. Part of the responsibility of being a City Commissioner is to attend meetings, understand the duties of your position, and consistently work and vote in a way that will contribute to the betterment of the community.

For government to run effectively in North Port, it takes a cooperative effort. Individual goals must be reconciled to form a team goal. You are one of five commissioners and a member of that team.

Together, the team carries out and/or assists in carrying out obligations to the residents of North Port. The Commission has the ultimate responsibility of making policy decisions. As a city commissioner, you have taken on the responsibility of serving as a vital link in providing resident input in the decision making process.

This handbook has been prepared to assist you in your role as a City Commissioner. The background information it contains about certain issues and items will hopefully make the process of decision-making easier. For more detailed information concerning the City, please consult the City Charter and Code of Ordinances. The City Charter states the powers and/or duties of the:

- City Commission Section 5.02;
- Mayor Section 5.03;
- City Manager Section 12.06;
- City Clerk Section 13.05; and,
- City Attorney Section 14.05

The City Manager, City Clerk, and City Attorney are also available to answer any questions you might have concerning the City of North Port.

Checklist

Being a new Commissioner is exciting and challenging. It is also an enormous responsibility. Adjusting your life to fit those responsibilities can appear to be very disorganized in the beginning. To help make sure that all "the loose ends are tied" the following checklist has been created. The list will remind you of all the important things that you need to do as a new Commissioner. After you have completed these items you will be ready to get started.

_____Meet with City Manager, City Clerk, and City Attorney for brief orientation

_____Obtain a Code Book from the City Clerk's Office

_____Obtain Access Cards to City Hall through Human Resources

_____Complete Insurance Forms from Human Resources

_____Introduce Yourself to Each Department Director. The City Clerk's Office can assist you with scheduling

_____File Financial Disclosure Form with the Sarasota County Supervisor of Elections

_____Schedule a Photo Opportunity through the Community Outreach Division

_____Submit a Professional and Personal Biography through the Community Outreach Division

_____Order Business Cards through the City Clerk's Office

_____Complete Commission Information Sheet with the City Clerk's Office

_____Obtain the Commission's Strategic Planning Materials from the City Manager's Office

_____Obtain a Commission Governance Guide from the City Manager's Office

_____Obtain Access to Commission Adopted Plans (i.e. Master Plans, Department Plans) from the City Manager's Office

_____Obtain a Sunshine Law Manual from the City Clerk's Office

_____ Obtain E-mail Access, Phone Password, and other technology for the Information Technology Division

Available Resources

Staff/Clerical Support

General staff and administrative support to members of the City Commission is provided through the City Clerk's Office for official City business. Secretarial services including scheduling of appointments, receipt of telephone messages, and word processing are available as needed.

Mail and Telephone Messages

Any mail addressed to you at City Hall will be available in your in-box on your door outside of your office. Since correspondence you receive regarding City business is public information, once opened, please provide the mail to the City Clerk for filing. A copy will be available to you if desired. Generic mail, advertisements, etc. are not required to be maintained by the City.

Additionally, citizens attempting to contact you at City Hall by telephone may leave you a message on the City's voice mail system if they prefer. Staff can provide instructions for you to access voice mail messages from your home or office.

Computers, cell phones, and technology

A computer and iPad are made available to assist you in the performance of your duties if you choose. You will also be assigned a cellular phone for City business. These devices may require some training or instruction; Information and Technology Division staff will be available to assist.

Responsibilities

As a city commissioner, you will face many challenging issues about the City's growth and development that must be resolved. Your decisions as a commissioner today will shape the North Port of tomorrow.

Being an elected commissioner is a perfect opportunity for genuine public service. There are many important responsibilities that go along with being a Commission member. This section will sum up some key issues that you may want to consider as you settle into your new responsibilities.

- You have a responsibility as a new member to understand the scope of the position and operating procedures. This information can be obtained by referring to the Municipal Code.

- Individual members should refrain from representing their own views or recommendations as those of the Commission unless the Commission has officially voted on the recommendation. If a commissioner is making a recommendation or expressing personal views, the commissioner should say that they are representing only themselves as individuals.

- As a commissioner, you should consider what is best for the entire community. You now represent the public interests of the entire City.

- A commissioner serves as a link between the community, staff, and the City by proposing new City programs and providing a channel for citizen response to these programs. It is important for the Commission to know the attitude of the citizens concerning these City programs. This knowledge will help Commissioners build a consensus around common goals and objectives.

- A commissioner should do his/her homework and be thorough on recommendations. Commissioners should completely review staff reports, plans, and materials provided before the meeting.

- A commissioner should be conscious of the relationship between the Commission and the staff. This relationship is basic for successful operation of any Commission.

Responsibilities (Continued)

- The City staff works for the City Manager, and through him/her they work for the City Commission. Staff does not directly work for commissioners. Therefore, it is not appropriate for commissioners to direct staff to do specific work.

  However, there is nothing wrong with turning in complaints or requests for service to the appropriate person. We have established a single point of contact in the City Manager's Office to make follow-up on complaints or requests easier. In addition, commissioners should feel free to talk to any staff member about City matters.

- Commissioners should make an effort to establish a good working relationship with the other commissioners. The success or failure of the Commission efforts is largely dependent on the degree of cooperation among the members of the Commission.

- Each member should do his or her part to ensure that the meetings proceed in an orderly and constructive manner. The Mayor is responsible for ensuring that Commission meetings move along without delay and with decorum.

- When a commissioner is participating in outside political activities, he/she should make it clear that the title is being used for identification only and that opinions do not represent those of the entire Commission.

- The single most difficult job of a Commissioner is to balance diversified views and find the common interest. It is easy to respond to a group interest without considering if this is the majority viewpoint. A commissioner must consider all those affected. This is not to say that the community input should be ignored, but it should be placed in perspective. It is very difficult for the Commission to do what everyone wants, but decisions should reflect the things that most people need.

Code of Ethics

Conflict of Interest/Gifts

State laws are in place which prohibit any action by a Commission member which may constitute a conflict of interest or an improper receipt of gifts. The purpose of such laws and regulations is to ensure that all actions are taken in the public interest.

Any time a Commissioner believes the potential for a conflict of interest exists or is unsure about gifts, he/she is encouraged to consult with the City Attorney or private legal counsel for advice. Staff also may request an opinion from the City Attorney regarding a member's potential conflict. Laws which regulate conflicts and gifts are very complicated. Violations may result in significant penalties including criminal prosecution and/or removal from office.

The City Attorney is always your best point of contact on ethics issues. It is recommended that if any doubt exists you should consult with the City Attorney.

It is critical to note that while the City Attorney can render advice on the interpretation of State Law, such advice is not absolute. The Florida Ethics Commission can provide binding interpretations and public officials are allowed to contact the Ethics Commission for written opinions. An Ethics Hot Line number is available for advice.

Reporting Forms

State Law requires the filing of various financial and disclosure forms throughout the year. These forms are available at the Sarasota County Supervisor of Elections Office.

The Sunshine Law

All 50 states and the Federal government have some type of open meeting or "sunshine" laws. This law was created to ensure ethical action in government. The Florida Sunshine Law is outlined in Florida Statutes, Chapter 286. You will receive a separate publication detailing this law.

Who Falls Under the Florida Sunshine Law?

The current law applies to all elected or appointed members of Commissions or boards of the State, county, municipal corporation or political subdivision, some private organizations which are providing service to a public agency and individuals who have been delegated authority to act on behalf of a public board or Commission.

What is a Meeting?

The Sunshine Law applies to a meeting of two or more members of the same board or Commission. The members of a public board or Commission may meet together socially provided that issues that may come before the board or Commission are not discussed. The key to a "meeting" is whether there is "foreseeable action" which may be taken by the public board or Commission.

The law states that the Commission is required to give reasonable public notice of a meeting. This notice is posted with the time and place of the meeting. Minutes of any such meeting must be recorded.

This law is important to understand as a Commissioner.

Structure of the City of North Port's Government

The government of the City of North Port has been established as a commission-manager form of government. This is an extremely popular form of government because it combines political leadership of the elected officials with the strong managerial experience of the City Manager. The most efficient administration of policy is produced because the Commission has a professional working for them. Governmental duties are divided between the commissioners and City Manager.

Commission Duties

The City Commission acts as the legislative body for the City. This includes a variety of actions and powers that are primarily concerned with matters of policy, budget, and local legislation.
The forms of action include:

- approving ordinances, resolutions, and contracts
- reviewing proposals for community needs
- initiating actions for new programs
- determining the City's ability to provide financing
- approving the annual budget presented by the City Manager

The powers vested in the Commission include:

- authority to adopt bylaws, rules, and regulations
- issue bonds for municipal purposes after approval by a vote of the residents
- establish the millage for ad valorem taxes and equalize special assessments
- make appointments to the various municipal boards of the City

City Manager Duties

The City Manager is a professional usually with a background in government management and serves as the chief administrative officer of the City. The manager is responsible for the municipal administration of the City.

The manager's duties include:

- supervising and coordinating the departments
- appointing and removing directors
- preparing the annual operating and 5-year capital budget for City Commission consideration

Structure of the City of North Port's Government (Continued)

The Relationship Between the Commission and the City Manager

The City Manager is hired by the Commission to administer the day-to-day operations of the City. The manager is expected to abstain from any political involvement, being strictly a non-political administrator. At the same time, Commission members and other "political" leaders are expected to refrain from intruding on the manager's role as chief executive. The manager is subject to the authority of the Commission, but the Commission should refrain from interfering in administrative matters and emergency operations.

An important part of being a city commissioner is understanding your relationship to staff. The City Manager, City Clerk, Deputy City Clerk, and the City Attorney are appointed by the Commission and report directly to the Commission. These are the only City employees that the Commission oversees. The City Manager is responsible for all other staff. The City staff implements public policy established by the City Commission. Commissioners do not have the authority to direct the work of staff members. Therefore, Commissioners should not take administrative matters into their own hands. If there is a concern with actions of staff, the City Manager should be notified.

The staff is responsible to provide the information needed by the City Manager to formulate recommendations to the City Commission. Staff will make recommendations to the City Manager based upon staff's expertise and experience. These recommendations will include the financial feasibility of such a proposal and alternate strategies to be considered by the Commission.

Commission Meetings

The City Commission typically holds its meeting the second and fourth Monday in the Commission Chambers at City Hall. The first meeting of the month is typically at 1 p.m. The second meeting of the month is typically at 6 p.m. The Commission typically holds one workshop a month. The Commission shall meet regularly and not less than once each month, but not during the month of August. Beginning in Fiscal Year 2015, a new special meeting will take place once a month for proclamations, special award presentations and employee and community member recognitions.

Special/Emergency Meetings

A quorum of the City Commission or the City Manager and one member of the City Commission may call a special meeting of the Commission. When a special meeting is called, a written notice shall be sent to all Commissioners and the City Clerk at least forty-eight hours before the meeting and state the cause for such a meeting. The City Manager and any one Commissioner may call an emergency meeting. An emergency meeting shall be called only when the conditions and circumstances indicate that emergency measures must be taken.

Agenda

The City Manager shall prepare an agenda for all formal and informal meetings, except special meetings where time does not permit.

Any Commissioner wanting to be on the agenda may submit a written request to the City Manager by noon on the Wednesday, preceding the City Manager's deadline to submit agenda items to the City Clerk. Commissioners can submit items to the City Clerk for inclusion by the City Manager. For regular meetings the City Manager will submit all agenda material to the City Clerk on the Monday prior to the Commission meeting. Each Commissioner shall be provided with a copy of an agenda, by the City Clerk, as far in advance of the meeting as time will permit. The agenda for regular meetings will be placed in an electronic format for the Commissioners.

Conduct of Meetings

The Mayor shall preside over all meetings. In his/her absence the Vice Mayor shall preside. The presiding officer has the responsibility to preserve the order and decorum of the meetings.

The following is a list of suggestions to assure the meetings run smoothly:

- Commissioners should not be involved in conversation or otherwise interrupt the meeting.
- Commissioners should obey the orders of the presiding officer.
- Commissioners that wish to speak about the item at hand shall address the Mayor. If a commissioner wishes to question a staff member, the Commissioner should address the City Manager who is entitled to answer the question or may designate a member of the staff for that purpose.
- A commissioner shall not be interrupted once he/she has started speaking, unless the commissioner yields to another question.
- Commissioners shall confine their remarks to the issue brought before the Commission.
- Commissioners shall refrain at all times from rude and derogatory remarks, abusive comments, and statements as to motives and personalities.

Meeting Protocol

Public meetings are where public reputations are made for the commissioners. As such, meetings are very important to the Commissioners. An important goal is to make sure meetings are not excessively long and the discussion is controlled during the meeting so as not to get side-tracked.

Below are four problems that a commissioner might experience while running a public meeting:

Not Controlling the Meeting

Many issues will bring numerous residents who want to address the Commission. The City sets a three-minute time limit for those addressing the City Commission. When needed, this time limit should be enforced.

Appearing to Seem Unfair

Commissioners should never bring up pros and cons of an agenda item before all testimony and evidence has been presented. Then the discussion should remain focused on the facts presented, not on the presenters.

Failing to Bring Issues to a Vote

Sometimes a Commission can get bogged down in petty details and endless searches for new data, and matters brought before the Commission seem to never be resolved. If commissioners take too long in making decisions, the situation may change and the recommendations can become obsolete.

Wasting People's Time

Try to follow the scheduled agenda. People do not like waiting to speak on an item. Commissioners should hold their general discussion until after the public hearing.

Communications

Overview

Perhaps the most fundamental role of a commissioner is communication – both with the public to assess community opinions and needs and with staff to provide policy direction and to gain understanding of the implications of various policy alternatives. Because the City Commission performs as a single body, it is important that general guidelines be understood when speaking for the Commission. Equally important, when members are expressing personal views and not those of the Commission, the public (and members of the media) should be so advised prior to making a statement. To foster a successful communications effort, it is helpful for Commissioners to discuss their views during Commission meetings and not just utilize other public forums (through the media, during public gatherings, etc.).

Correspondence From Commission Members

Members of the Commission will often be called upon to write letters to citizens, businesses, or other public agencies. Typically, the Mayor or City Manager will be charged with transmitting the City's position on policy matters to outside agencies on behalf of the City Commission. Individual Commissioners will often prepare letters for constituents in response to inquiries or to provide requested information. City Commission letterhead is available for this purpose, and staff can assist in the preparation of such correspondence. Due to the Open Records Law, copies of such letters must be given to the City Clerk for filing.

On occasion, members may wish to transmit correspondence on an issue which the Commission has yet to take a position or about an issue for which the Commission has no position. In these circumstances, members should clearly indicate within their letters that they are not speaking for the entire Commission but for themselves as one member of the Commission. City letterhead and office support may be utilized in these circumstances.

Proclamations

Ceremonial proclamations are often requested of the City in recognition of an event or individual. Proclamations are not statements of policy, but a manner in which the City can make special recognition of an event (e.g. National Telecommunicators Week). As part of his/her ceremonial responsibilities, the Mayor usually presents proclamations issued by the Commission.

The Public Records Law

City records, with a few exceptions, are open to the public. The Supreme Court of Florida has construed "public records" to include "any material prepared in connection with official agency business which is intended to perpetuate, communicate, or formalize knowledge of some type."

Florida Statutes Definition of Public Records

All documents, papers, letters, maps, books, tapes, photographs, films, sound recordings or other material, regardless of physical form or characteristics, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

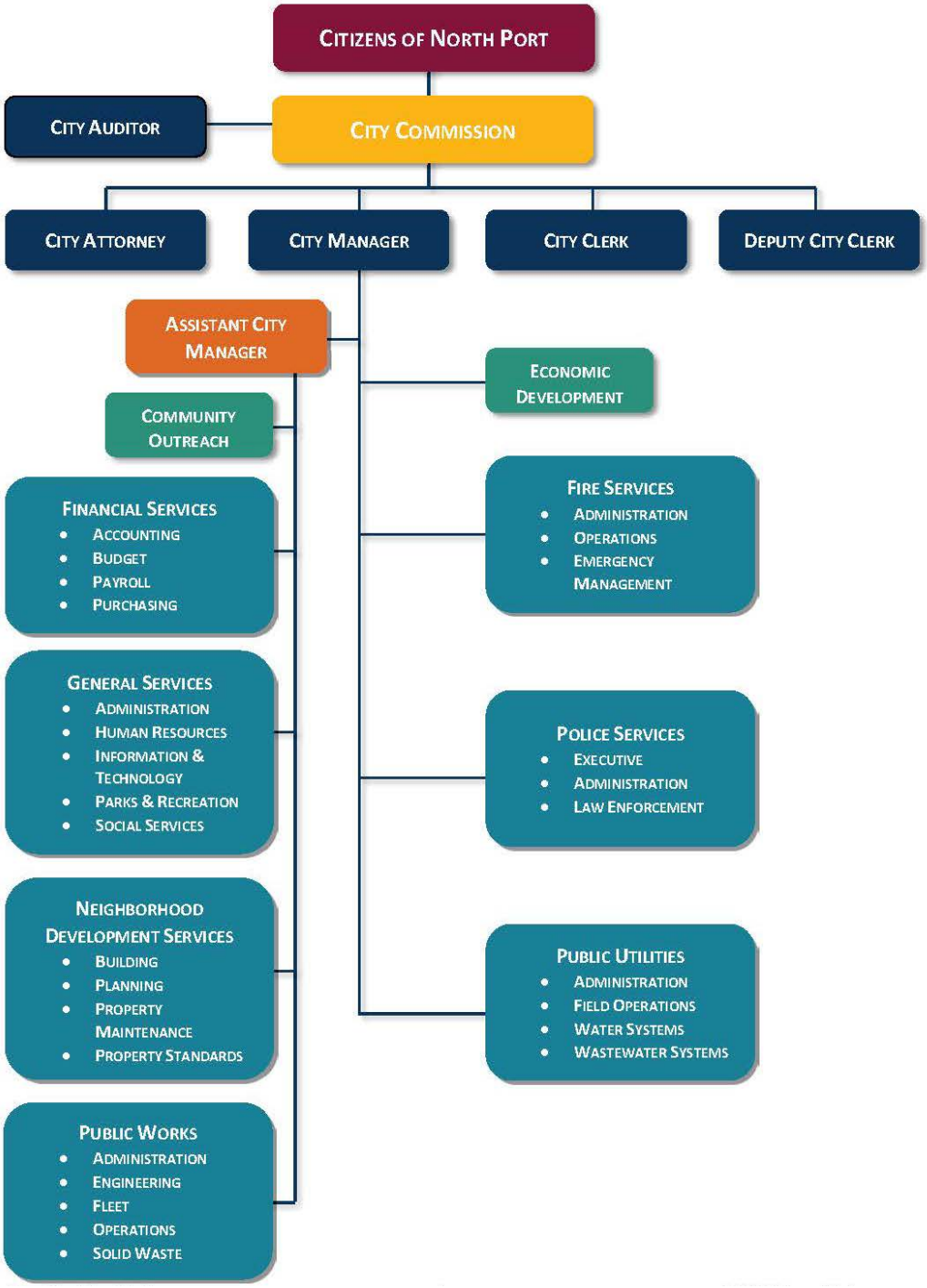
Florida Statutes Definition of an Agency

Any state, county, district, authority, or municipal officer, department, division, board, bureau, commission, or other separate unit of government created or established by law and any other public or private agency, person, partnership, corporation, or business entity acting on behalf of any public agency.

The law requires that all agency records may be inspected and examined by any person desiring to do so, at any reasonable time, under reasonable conditions, and under supervision by the custodian of the public record or the designee. A copy or a certified copy of the record must be furnished upon payment of the fee prescribed by law or, if a fee is not prescribed by law, upon payment of the actual cost of duplication of the record.

An agency may not impose a waiting period before allowing access to public records, but there may be a reasonable delay in producing records. This is not done to frustrate a person's right to review public records, but gives the custodian reasonable time and the ability to protect the records and keep them safe.

Organizational Chart



Department Directors Contact Information

Finance Director: Peter Lear - Office: 429-7119 Cell: 628-8792
E-mail: plear@cityofnorthport.com

Fire Rescue Chief: William Taaffe - Office: 240-8151 Cell: 628-4845
E-mail: wtaaffe@cityofnorthport.com

General Services Director: Robin Carmichael - Office: 419-7129 Cell: 628-0283
E-mail: rcarmichael@cityofnorthport.com

Neighborhood Development Services Director: Scott Williams – Office: 429-7005 Cell: 628-8317
E-mail: swilliams@cityofnorthport.com

Police Chief: Kevin Vespia – Office: 429-7306 Cell: 628-8127
E-mail: kvespia@northportpd.com

Public Works Director: Branford Adumuah – Office: 240-8051 Cell: 628-4908
E-mail: badumuah@cityofnorthport.com

Utilities Director: Rick Newkirk, Interim – Office: 240-8001 Cell: 628-8160
E-mail: rnewkirk@cityfnorthport.com

City Manager's Office

The goal of the City Manager's Office is to provide daily administration of the City and assistance to the City Commission in establishing the policies, programs and services offered to the community.

The City Manager is appointed by the City Commission to serve as the Chief Administrative Officer of the organization and coordinate the fulfillment of policy and programs established by the City Commission. The City Manager provides overall direction to departments that administer City programs and services; implements inter-departmental programs for strategic planning, emergency preparedness and special projects; and fosters intergovernmental relations, lobbying, economic development, and public information efforts. To fulfill these duties, the City Manager is aided by an Assistant City Manager, 7 City departments, and the talent and skills of approximately 540 City employees. These departments and employees are under the immediate supervision of department directors appointed by the City Manager to ensure quality service to the citizens and visitors of the City of North Port.

The Economic Development Office was established in 2009 and is a division of the City Manager's Department. This office is managed by a coordinator who is responsible for planning, coordinating and executing the City's economic development activities and redevelopment initiatives. Some of those duties include working with developers and entrepreneurs to facilitate real estate development. Other duties are focused on business retention and encouraging local star-ups.

The Community Outreach Office was established in 2007 and is a division of the City Manager's Department. The office is managed by a manager who is focused on connecting the North Port community by telling North Port's story in a variety of different mediums, including video, print, and on-line. This Division plays a key in developing the marketing, public relations, and communication strategies for the City's programs, projects, and services. The Division also works to provide ways for citizens to engage in their local government.

The City Manager's Office also is home to a citywide public information officer who works directly with local media and oversees the City's media relations strategy. Housed in the police department, this public information officer plays a key role in being a direct link with local reporters and City Hall.

City Clerk's Office

The Office of the City Clerk exists to ensure the integrity of municipal governance through the administration of the electoral, legislative, and record keeping processes as set forth in the City Charter, City Code and State Statute. The City Clerk serves as the Clerk of the Commission and is responsible for keeping a public record of all proceedings of the Commission, including the certification of all ordinances and resolutions. The City Clerk is the official custodian of the City seal and any other papers, documents or records pertaining to the City.

The City Clerk's Office is committed to ensuring an informed citizenry by providing access to City government through open and accessible meetings and accurate recording of the City Commission proceedings; by protecting and preserving City documents and records; by conducting fair and democratic elections; and by providing excellent service to the public.

The City Clerk's Office also plays a key role in the formation and administration of advisory boards; oversees the creation of the City Commission budget; and provides necessary executive and administrative work for the City Commission.

City Attorney's Office

In 2014, the City Commission hired a full-time City Attorney to be housed in City Hall. For decades, this charter office was provided by a private firm through contract. The City Attorney's Office is responsible for all legal matters related to the City of North Port, from contract review to courtroom proceedings.

Finance Department

The primary mission of the Finance Department is to preserve the financial integrity of the City of North Port, while assuring the availability of funds to accomplish the City's goals.

The City of North Port Finance Department's primary areas of service are Finance, Budgeting, Accounting and Purchasing. Financial responsibilities include budgeting, accounts payable, payroll, investment management, debt management, district and capital assessment management, and overseeing the city's budget.

Accounting

The employees of this branch prepare all financial reports in accordance with GAAP (Generally Accepted Accounting Principles), make all payments to vendors, and ensure compliance with state and federal requirements. This branch is also responsible for recording all revenue transactions for the City. These transactions include Utility payments, Solid Waste Pickups, Building Permits, Impact Fees, and Parks and Recreation payments.

Finance and Budgeting

The Finance Department prepares the budget for the City on behalf of the City Manager and in cooperation with all departments. The fiscal year begins October 1st, and the budget process starts in January.

Purchasing

Purchasing is responsible for developing and implementing all policies and procedures related to purchases for the City of North Port. To ensure the financial integrity of the City, purchases of various goods and services are reviewed by Purchasing.

North Port Fire Rescue

The North Port Fire Rescue Department offers fire suppression, advanced life support, emergency medical services, disaster preparedness, response and recovery, and fire prevention functions. The Department provides emergency services to the City of North Port and, under interlocal and mutual aid agreements, to portions of unincorporated Sarasota County and Charlotte County.

All lied personnel are highly-trained Florida State-certified firefighters and emergency medical technicians or paramedics. The City's Emergency Services Divsiion maintains a State-certified technical rescue team, a mass casualty incident trailer, and a utilitiy-terrain vehicle for patient transport and wildland firefighting.

Emergency Management Division

The Emergency Management Division ensures City government, residents and businesses are prepared for any hazard. Additionally, Emergency Management maintains the City's Emergency Operations Center for emergencies and disasters which require support from all departments of City government. The North Port Community Emergency Response Team is supported by Emergency Management through organizational guidance, resource support, and mission assignment during emergencies.

Fire Prevention Division

The City's Fire Prevention Division provides fire inspection services during building construction, and annual re-inspections to ensure compliance with the State Fire Prevention Code. Smoke detector checks, station visits, and presentations are a part of the every day duties.

Administrative Services

Administrative Services provides full support to the department through budgeting, fiscal and property accounting, reception services, and facility maintenance.

The following is a list of the City's Fire Rescue Stations:
Station 81: 4980 City Center Boulevard, North Port, FL 34286
Station 82: 5650 North Port Boulevard, North Port, FL 34287
Station 83: 3601 E. Price Boulevard, North Port, FL 34288
Station 84: 1350 Citizens Parkway, North Port, FL 34288
Station 85:1045 N. Calera Street, North Port, FL

General Services

The Department of General Services mission is to provide customers community-based programs, customer-focused services, technology-driven information by a highly-talented workforce to ensure the citizens of North Port enjoy a viable and sustainable quality of life. Services and programs are delivered through the divisions of Human Resources/Risk Management, Parks & Recreation, Social Services and Information & Technology.

Human Resources

Human Resources continues to support a Citywide workforce of approximately 540 through a variety of programs and services, including recruitment and retention, benefits administration, classification/compensation, performance management, personnel policy research and development, employee outreach and recognition, labor contract coordination, personnel file maintenance and public records request tracking, training and development, safety and risk management, workers' compensation and administration of the City's general liability/property insurance coverage.

Information Technology Division

The purpose of the Information and Technology Division is to ensure the integrity of and access to information. Information Technology is responsible for effective and efficient delivery of information technology services that add measurable value to the departments of the City. This can include software, hardware, telecommunications, and more.

Social Services Division

Social Services was established in 1980 to assist families and individuals in need of short term financial assistance. The mission is to offer solutions to alleviate despair, retain or restore dignity, and direct families toward economic independence and productivity. Social Services is a nonprofit governmental entity funded by the City of North Port. Additional funding sources are received through grants, generous individuals, churches, civic groups, schools and collaborative partners. This enables the City to provide assistance to families and individuals that are experiencing a short term unavoidable financial crisis.

Parks and Recreation Division

The mission of the Parks and Recreation Division is to achieve community outcomes by enriching life experiences through recreation. Parks and Recreation is committed to improving the quality of life in our community by promoting healthy lifestyles, maintaining community assets, being good stewards of our parks and open spaces and fostering a sense of community pride and common purpose.

Neighborhood Development Services

The Neighborhood Development Services Department facilitates a variety of programs that promote the responsible development of the City as a safe, livable environment for all of its citizens. The Department's primary functions include Planning, Zoning, Land Development and Building Plan Review, Permitting and Licensing, Building Inspections, Redevelopment, Community Development, Property Maintenance, and Property Standards.

North Port Police Department

The mission of the North Port Police Department is to provide the community with the highest level of law enforcement and crime prevention possible and to: protect life and property; preserve the peace; prevent, reduce, and deter crime and the fear of crime; enforce the law fairly; protect individual rights; and, to provide a safe and secure environment for all citizens.

In order to accomplish this mission, the Police Department will aggressively pursue crime prevention, crime suppression, investigative and community oriented programs. Our mission includes the creation of partnerships within the community we serve to secure and promote safety for all residents and visitors.

Public Works Department

The mission statement of the Public Works Department is to efficiently maintain the public infrastructure and provide services to ensure the safety and well-being of our residents.

The Public Works Department is responsible for maintaining the safe and efficient passage of traffic on the City's 822 miles of roads, bridges, sidewalks and bikeways. It is also responsible for maintaining and repairing storm drains, canals and other water control structures to protect homes and infrastructure from standing or flowing stormwater. Public Works also ensures the integrity of the potable water supply for customers whenever water is withdrawn from waterways for potable water uses.

The following is a list of activities performed by the Public Works Department and its personnel:

- Maintaining (re-grading) swales
- Rehabilitating canals and retention ditches
- Replacing culverts
- Traffic sign installation and replacement
- Traffic markings
- Pothole and street repairs

The Public Works Department is comprised of five separate Divisions which perform services for the residents of North Port. Each Division Head reports directly to the Public Works Director. There is a link to our Organizational Chart at the bottom of this page for further information.

There are three (3) Divisions which receive their funding through the Road and Drainage District: 1) Administration Division; 2) Operations Division; and 3) Engineering Division.

There is one (1) division which receives funding through the Solid Waste District: Solid Waste Division.

There is one (1) Division which is internally funded by all City Departments: Fleet Maintenance Division.

North Port Utilities

North Port Utilities' mission statement is to support the City's mission by continuing to provide our customers quality water and sewer services in a safe, healthful, cost-effective and efficient manner and to accommodate the growth of the North Port community through the planned expansion of its systems.

The City of North Port Utilities Department operates 24 hours a day, seven days a week, to provide and distribute a reliable supply of quality, safe drinking water and a wastewater collection system that needs of its customers and respects and enhances the environment. The City has more than 18,000 connections that service approximately 38,000 customers in the City of North Port and unincorporated Sarasota County.

The Budget Process

The budget is one of the key tools in operating government. When someone looks at the budget they can identify the City's priorities and goals. The Finance Department has developed an exceptional document for budget purposes. The following is a brief overview of certain budget items. To obtain a thorough understanding, the annual budget document should be reviewed. Some of the important information that you will find in the budget manual are fund descriptions, departmental goals, budgetary policies, and a listing of the expense detail of each fund.

Goals and Objectives

The initial step in the annual budget process is to establish the City's goals and objectives. This is performed by the City Commission at a meeting. New programs or projects as well as additional staff positions considered necessary to attain City goals are presented. This process is designed to pursue goals specifically identified by the City Commission. The requirements to pursue the goals and objectives approved by the City Commission are then included in the actual budget request discussed below.

Annual Operating Budget

The annual budget addresses the expenses related to the City's regular operations, i.e. salaries, supplies, equipment, and debt service. The budgetary process opens a channel through which department directors and the City Manager can communicate to the City Commission their proposed plans and programs for consideration. The City Commission reviews the various areas of the budget, and, through the appropriations process, decides upon the work plan for the next fiscal year.

The City of North Port's fiscal year runs from October 1 through September 30. The Commissioners must remember that Florida law prohibits deficit spending by cities and counties. The City staff must submit a balanced budget each year to the City Commission to be in compliance with this law.

Preparation

Department Directors attempt to anticipate their needs for the coming year and include programs proposed to be added, deleted, increased, or decreased in scope. A budget request is compiled for the new fiscal year. This includes documentation and justification by line item. The departmental budget request must be submitted by a specific date to the Finance Department. The Finance Department compiles the budget requests and presents them to the City Manager. After a thorough review, the City Manager finalizes the budget and presents it to the City Commission.

The Budget Process (Continued)

Adoption

State Statute has set mandated specific procedures and timetables for the adoption of the budget that must be followed explicitly. In July the recommended budget is presented to the City Commission at a regularly advertised public meeting. In late July there is a work session to specifically present the budget to the Commission. This meeting is open to the public and used for the thorough review of the budget by the Commissioners. By the end of the day the City Commissioners are able to give the City staff a general consensus on the changes that should be made to the budget.

In September, there are two public hearings that must be held. The first shall be used to adopt a tentative millage on ad valorem taxes and a tentative budget. Two weeks after the first public hearing , the second and final hearing is held to adopt the budget and the millage rate.
Five-Year Capital Budget

In addition to the operating budget, a budget proposing capital expenditures for the next five years is developed and presented to the Commission. This longer term budget provides for more effective planning of program needs and facilitates more accurate funding needs over a longer period. While the Operating Budget is a legal document, the Capital Budget is simply a planning tool.

Implementation

Day-to-day administration of the budget is the responsibility of the City Manager. The implementation phase is basically concerned with applying managerial techniques of accounting, scheduling, purchasing, personnel management, expenditure and revenue reporting in an effort to achieve the goals established by the budget. However, the Commission remains legally responsible for monitoring programs to ensure proper implementation.

The budget is adopted on a line-item basis. The City Manager is authorized to approve transfers between line items within any department with all such adjustments reported monthly to the City Commission. Transfers between departments and increases or decreases in the total budget for a fund must have prior approval by the City Commission.

Audit

The City will employ an independent auditor each year to examine the accounting procedures and practices used during the preceding year. The accountants examine all phases of the financial administration of the City including Federal and State grant monies. Their final report is presented to the City Commission, usually before March of the following fiscal year.

Budgetary Policies

Travel and Training

The budget includes sections for travel and training for City Commissioners, appointed board members, and public employees. A copy of the training and travel procedures for Commissioners policy has been included in the last section of this handbook.

Appendix

- Observed Holidays
- City Charter
- Code of Ethics
- City Advisory Boards and Committees
- Form 1 - Statement of Financial Interests for the Calendar Year
- Form 6 - Full and Public Disclosure of Financial Interests for the Calendar Year
- Form 9 - Quarterly Gift Disclosure
- Form 30 - Donor's Quarterly Gift Disclosure (Gifts between $25 and $100)
- Investment Policy
- Training & Travel Procedures
- Outside Meetings and Training Opportunities
- City Map

Observed Holidays
(City Hall is Closed)

New Year's Day
January 1

Martin Luther King, Jr. Day
Third Monday in January

President's Day
Third Monday in February

Memorial Day
Last Monday in May

Independence Day
July 4

Labor Day
First Monday in September

Veterans Day
November 11

Thanksgiving/Day After
4th Thursday November & 4th Friday in November

Christmas Eve, December 24th
Christmas Day, December 25th

Holidays that fall on a Saturday or a Sunday are recognized either on the preceding Friday or subsequent Monday.

Outside Meetings and Training Opportunities

As a City Commission member you will periodically have the opportunity to attend seminars, municipal league functions, community events, and other activities. To the extent you are comfortable, every effort should be made to attend these events. Following is a list of events and seminars that will be especially helpful to Commission members.

- Institute for Elected Municipal Officials - Following local elections, the Florida League of Cities offers a newly elected officials' institute. These educational sessions take place after newly elected officials have taken office. They give participants an opportunity to get acquainted with State law, policies and practices of municipal government, and to ask questions and network with other officials. The primary objective of the Institute is to provide elected municipal officials with an intensive academic program that will assist them in effectively meeting the requirements of their elected role. The program offers a comprehensive overview of Florida municipal government, presented by a faculty of top professionals in the field. Started in 1992, the IEMO program has graduated more than 1,700 municipal officials. The Institute is a three-day program structured in a Friday through Sunday format. The goal is to make the program as accessible as possible. There should be one offered in January of 2013. Information will be provided to you as it becomes available.

- The Florida League of Cities annual conference is typically held in August of each year, and moves around the state to different cities. The program gives all municipal officials the opportunity to expand their expertise in the handling of everyday city business as well as learn more about current issues affecting the municipalities in Florida. Officials are strongly encouraged to attend.

- The Florida League of Cities Legislative Conference is held each November. During this meeting, the League's Legislative Policy Statement is approved by the membership. The policy statement, the work product of the League's five legislative policy committees, directs the League's lobbying efforts for the upcoming Florida legislative session. Keynote speakers are also on hand to provide their perspective on the key municipal issues and the state's political climate.

- The League's purpose is to focus on those legislative issues most likely to affect daily municipal governance and local decision making. The Municipal Home Rule Powers Act and the Florida Constitution provide that cities in Florida have the authority to govern themselves locally, independent of state control. Preserving Home Rule, educating citizens on this valuable right, and maintaining a focus on those issues that directly affect self-governance, service delivery and the quality of life of each municipality are essential goals of the Florida League of Cities.

Outside Meetings and Training Opportunities (Continued)

- Every year during the State Legislative session, League members attend Legislative Action Days in Tallahassee to hear from legislators and League staff on what the legislative session holds for municipalities. Following the meeting, delegates go to the Capitol to meet with their legislator's one on one and to let them know what issues are important to the League and Florida cities. Legislative Action Days is a valuable opportunity for members to get to know their legislators and to view the Legislature at work first hand. The date of this conference varies year to year, depending on session schedules.

- The Florida League of Cities uses legislative policy committees to help shape the legislative priorities of the League. In an effort to get more cities involved, the League limits each city to having no more than one elected official on each of the Legislative Policy Committees. However, an elected official and a city employee from the same city may serve on the same policy committee. The policy committees typically meet four times a year a varying places throughout the State. One is in conjunction with FLC Legislative Conference and another is in conjunction with FLC Annual Conference. This year the Committees are:
    - Finance, Taxation and Personnel Committee
    - Transportation and Intergovernmental Relations Committee
    - Environmental Quality Committee
    - Growth Management & Economic Development Committee
    - Urban Administration Committee

- The National League of Cities holds an annual Congress of Cities and Exposition. It is a gathering of city officials, the Congress of Cities is held each year in November or December in a selected city. The conference provides educational content on the most pressing challenges facing city leaders. Conference attendees hear from prominent speakers and issue experts, participate in leadership training sessions, attend issue-specific workshops, mobile workshops, and leadership training sessions.

- The National League of Cities holds a Congressional Cities Conference. The 2013 Congressional City Conference, to be held March 9-13, 2013 in Washington D.C., offers opportunities to hear from respected national figures, network with other city leaders, participate in innovative workshops, learn new skills and lobby on Capitol Hill.

CITY OF

SARASOTA

City of Sarasota Orientation Process for New Elected Commissioners by the Office of City Auditor and Clerk:

Reference material is provided to and reviewed with each newly elected Commissioner including:

- The Charter of the City of Sarasota, the Sarasota City Code,
- The City's Zoning Code as each Commissioner is assigned a copy of both codes
- An overview of the format of both codes,
- The pamphlet entitled *Guide to the Sunshine Amendment and Code of Ethics for Public Officers and Employees* prepared by the Florida Commission on Ethics,
- The latest edition of Florida's *Government-in-the-Sunshine Manual* prepared by the Office of the Attorney General,
- An overview of the functions of the Office of the City Auditor and Clerk,
- The City's Resolution No. 10R-2187 concerning the City's policy regarding use of the City-provided e-mail accounts,
- Administrative Regulation No. 045.A001.0512 concerning Workplace, Email, Internet, and Intranet Acceptable Use Policy which is also signed by the newly elected Commissioner,
- Guidelines for *Office Outlook Web Access* prepared by the City's Information Services Department which provides information on accessing the City-issued e-mail address from remote location,
- A handbook prepared by the Office of the City Auditor and Clerk with information concerning the City's approximately 25 Advisory Boards,
- An overview of the Agenda preparation and production process including a review of the applicable software programs including eAgenda, Granicus, and iLegislate,
- Issuance and overview of the functionality of the iPad tablet computer on which all Commissioners receive their automated Agendas and backup material,
- A *Quick Reference Guide* for eAgenda and a guide to iLegislate entitled *Get started using iLegislate* prepared by the Office of the City Auditor and Clerk,
- A *Granicus User Quick Reference Sheet* on the use of the Granicus software system,
- An explanation of the three pension plans, police, fire, and general employees, and the Employee Retirement Account Committee which makes recommendations concerning investments of the Defined Contribution Plan,
- Prepare and organize the annual State of City's Pension Plans workshop to properly educate and provide professional presentations of fire, police, general, and defined contribution plans.
- An overview of the processes the City uses to comply with Florida's Public Records Law and the Central Records facility,
- A tour of the City's media studio and a description of the various programming produced by the Office of the City Auditor and Clerk including Commissioner's Corner featuring a topic narrated by different Commissioners.

The City Manager's Office provides a similar orientation whereby newly elected commissioners meet one on one with each city director to go over the responsibilities of the department.