

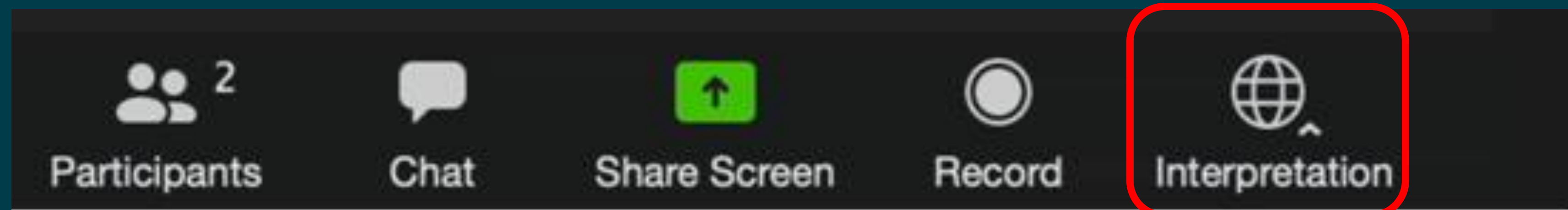
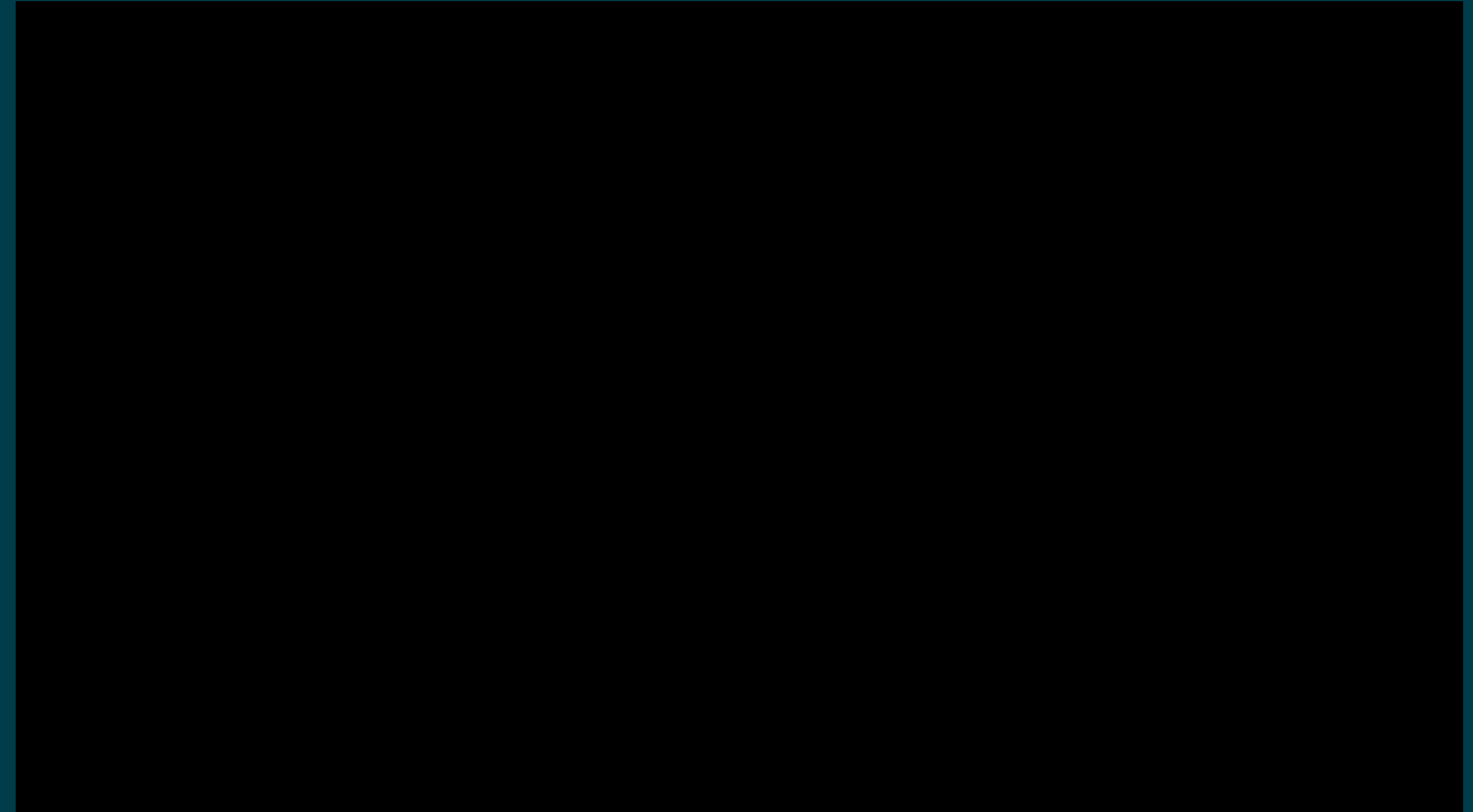
**Community Stabilization and Opportunity
Pathways (CSOP) Fund Commission
Meeting #2**

**Hybrid Meeting
September 18, 2023**

Interpretación

La interpretación en simultáneo para esta reunión se dará en español. Por favor haz clic en el icono INTERPRETATION (el globo) en tu barra de herramientas para acceder al idioma deseado.

La presentación está disponible en español. Vaya a www.sanjooseca.gov/FundCommission y descargue la presentación para verla en su idioma preferido.



www.sanjoseca.gov/FundCommission

COVID-19 RESPONSE AND RECOVERY
[COVID-19 Pandemic Help for Residents](#) | [Businesses](#) | [Nonprofits](#)

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CITY OF SAN JOSE
CAPITAL OF SILICON VALLEY



RESIDENTS BUSINESS GOVERNMENT NEWS & STORIES

- Economic Development

- Community Stabilization and Opportunity Pathways Fund Commission**
- Office of Cultural Affairs
- Outdoor Vending
- + Real Estate Services
- Staff Directory
- Workforce Development
- Work2Future Board

Your Government » Departments & Offices » Economic Development »

COMMUNITY STABILIZATION AND OPPORTUNITY PATHWAYS FUND COMMISSION

- 
Apply now!
- 
Outreach Events
- 
Commission Details

Commission Agenda

1. New Commissioner Welcome and Introduction
2. Staff Presentation
 - Discussions/Q&A with Commissioners
3. Public Comment
4. Adjournment



Commissioner Welcome and Introduction

Welcome to our new commissioner!

- Julie Vennewitz-Pierce
- Tell us briefly about your background.
- What is your main area of interest in this commission?



Purpose

The purpose of the Fund is to uplift under-resourced communities in San José through these two program areas:

- **Community stabilization** (e.g., preventing the involuntary displacement of residents, communities, and small businesses through affordable housing preservation, rental assistance, and similar programs).
- **Opportunity pathways** (e.g., increasing economic security and educational attainment through training programs, support services, entrepreneurial assistance, and similar programs).

Commissioner Involvement

Level of Involvement	Role
Inform	<ul style="list-style-type: none"> • Review information
Consult/ Incorporate	<ul style="list-style-type: none"> • Consult on the selection of the third-party Fund Manager • Review and provide feedback on Annual Performance Reports
Collaborate	<ul style="list-style-type: none"> • Participate in the development of the Strategic Plan • Guide and support public outreach/engagement • Guide scoping of competitive grant solicitations • Participate in fundraising activities
Empower	<ul style="list-style-type: none"> • Receive recommendations from the Fund Manager and approve grants

Attend, prepare for, and actively participate in regular public meetings of the Commission

Commission Work Plan

Month	Tentative Commission Work/Tasks
Meeting #1: May 18, 2023	<ul style="list-style-type: none"> • Oath of Office • Orientation: review context, roles, and high level workplan • Discuss future meeting days/times
Meeting #2: September 2023	<ul style="list-style-type: none"> • Review proposed Bylaws and supplemental group agreements • Supplemental training on Commissioner rules/requirements
Meeting #3: Winter 2023	<ul style="list-style-type: none"> • Adopt Bylaws • Introduction to the RFP Process • Discuss Draft RFP for Fund Manager
2024 (3-5 meetings)	<ul style="list-style-type: none"> • Complete RFP process • Onboard the Fund Manager • Kick off the Strategic Plan Process

Staff Presentation

1. Group Agreements
2. City Attorney Presentation
 1. Brown Act
 2. Other
3. Commission Bylaws
4. Reminders
5. Look Ahead

Group Agreements

- Respect all opinions and perspectives, even those different from our own.
- No personal attacks.
- Honor cultural competency and everyone's different lived experiences.
- Practice patience to ensure all Commissioners, including non-English speakers, fully understand the content, action items, and decision points.

Brown Act and Supplemental Commissioner Training

Community Stabilization and Opportunities Fund Commission Bylaws

Commission Governance Background

- Council Policy 0-4: Consolidated Policy Governing Boards and Commissions
- Council Policy 0-37: Code of Conduct for Public Meetings in the Council Chambers and Committee Rooms
- SJMC 2.08 - Boards, Bureaus and Commissions
- SJMC 2.08.50 - Community Stabilization and Opportunity Pathways Fund Commission
- Commission Bylaws
- Rosenberg's Rules of Order
- Group Agreements

Purpose of Bylaws

- Establish a set of rules that govern the management and procedures of the commission's meetings.
- Help to map out the duties and obligations of commissioners and City Staff.
- Provide guidance on voting and decision-making processes.
- City of San Jose Bylaws Template
 - Most commissions operate under standard set of Bylaws established by the City Clerks Office, unless otherwise designated.
 - Community Stabilization and Opportunity Pathways Fund Commission has been designated as one of the commissions able to adopt amended bylaws, should they decide to.

Bylaw Articles

- Article 1 – General Provisions
- Article 2 – Officers: Chair and Vice Chair
- Article 3 – Officers: Chair Pro Tempore
- Article 4 – Secretary
- Article 5 – Meetings
- Article 6 - Meeting Agenda and Procedure

Article 1 – General Provisions

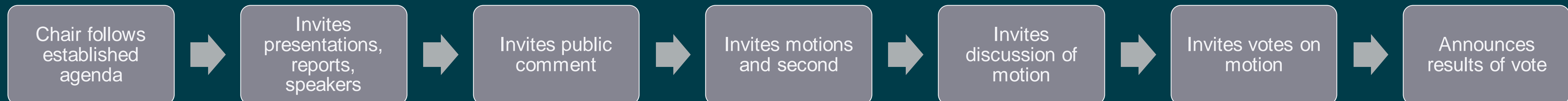
- **Consultant Facilitator and City Staff Additions to the General Provisions**
 - Section 106. GOOD STANDING. Commissioners must be in good standing and embody good character during and outside the Commission meeting setting.
 - Section 107. GROUP AGREEMENTS. Commissioners will adhere to the group agreements established by the commission. Group agreements will be revisited on a bi-annual basis and updated or amended as necessary.
- Are there additional general provisions we should consider?

Article 2/3 – Officers: Chair/Vice Chair/ Chair Pro Tempore

- **Commission Chair**
 - Responsible for presiding over the meeting.
 - Conducts meeting in alignment with:
 - Rosenbergs Rules of Order
 - City Policy and San Jose Municipal Code
 - Serves as the signatory for any documents or recommendations from the commission.
- **Vice Chair**
 - Preside over meetings in absence of Chair and assumes all other duties.
 - All other duties in absence of Chair
- **Chair Pro Tempore**
 - Available to fill either Chair or Vice Chair position in the event of a vacancy.

Rosenberg's Rules of Order

- Simplified rules of parliamentary procedure or the rules of procedure for meetings.
- Founded on the principles that:
 1. Rules should establish order.
 2. Rules should be clear.
 3. Rules should be user friendly.
 4. Rules should enforce the will of the majority while protecting the rights of the minority.
- Basic Format



Commission Management Options

1. Standard Bylaws and Commission Staffing

Retain all officers and duties outlined in bylaws template.

2. Hybrid Commission Staffing

Retain all officers and Chair is responsible for specified duties. Chair is selected at the time Fund Manager is onboarded.

All other duties are delegated to Consultant Facilitator and City Staff until Fund Manager is selected and onboarded.

Commissioner Discussion and Question/Answer Session



Bylaws Next Steps

- Staff to update/finalize Bylaw draft
- Review finalized Bylaws at next commission meeting
- Vote on adoption of Bylaws at next commission meeting
- Electing Officers if needed

Looking Ahead

Commission Meeting #3

- Adopt Bylaws
- Introduction to the RFP Process
- Discuss Draft RFP for Fund Manager

Public Comment

Public Comment

Code of Conduct for Public Meetings Policy:

<https://www.sanjoseca.gov/home/showpublisheddocument/12901/636670004966630000>

In-person Protocols:

If you would like to participate and you are in the room, please complete a yellow request to speak comment card, give it to City staff on either side of the room, and come up to the podium at the appropriate time once your name is called.

Virtual Protocols:

If you are joining us remotely, please press the 'raise hand' feature and you will be called upon by staff and invited to unmute and speak after members of the public in the room have spoken.

You can also complete a comment card and provide input on this process via email or by sending a letter to zacharias.mendez@sanjoseca.gov

Public Comment

- Zoom webinar:
<https://sanjoseca.zoom.us/j/89172265922>
- Webinar ID: 891 7226 5922
- Phone numbers: 1-408-638-0968, 1-213-338-8477, 1-888-475-4499 (Toll Free), 1- 877-853-5257 (Toll Free), International numbers available: <https://sanjoseca.zoom.us/j/89172265922>



02:00

Adjournment

Commissioner Training

Daniel Zazueta, City Attorney's Office

Disclaimer: The images and material contained in this presentation may be copyrighted. Their use in this presentation are for educational purposes only. The display of such material constitutes fair use pursuant to Title 17 U.S.C. Section 107.



A nighttime photograph of the San Jose City Center building, a modern structure with a prominent glass tower and a large, curved, metallic facade. The building is illuminated from within, and the sky is filled with numerous colorful fireworks exploding in shades of blue, purple, and white. The overall scene is festive and celebratory.

WELCOME

CITY OF
SAN JOSE
CAPITAL OF SILICON VALLEY

Training Road Map



Brown Act



Public Record Act




Policies/Bylaws

Rules of Order



Conflicts of Interest





San Francisco Chronicle

"Your Secret Government"


Ralph M. Brown Act (1953)

"The public commissions, boards and councils and the other public agencies in this State exist to aid in the conduct of the people's business. It is the intent of the law that their actions be taken openly and that their deliberations be conducted openly."

(California Government Code Section 54950)

WHY?

You are the front line of civic engagement, serving an important role in city government and our democracy to help the public participate in the decisions of their government and help the government be transparent and accountable to the people it serves.



"The people of this State do not yield their sovereignty to the agencies which serve them. The people, in delegating authority, do not give their public servants the right to decide what is good for the people to know and what is not good for them to know. The people insist on remaining informed so that they may retain control over the instruments they have created."



LEGISLATIVE BODIES

W (a) The governing body of a local agency or any other local body created by state or federal statute.

A (b) A commission, committee, board, or other body of a local agency, whether permanent or temporary, decisionmaking or advisory, created by charter, ordinance, resolution, or formal action of a legislative body.

O ?



EXCEPTION:

An ad hoc temporary sub-committee with a defined purpose and a definitive end made up of less than a majority of members is not subject to the Brown Act.

Meetings must be open to the public and properly noticed.

A "meeting" means any congregation of a majority of the members of a legislative body at the same time and location to hear, discuss, deliberate, or take action on any item that is within the subject matter jurisdiction of the legislative body.

WHAT?

Quorum = Majority



No Quorum



YES!

Serial Meeting

NO!

YES!



YES!

Serial Meeting

NO!

YES!



Serial Meeting



“Hub and Spoke”







Don't discuss commission business with a majority

Basic Rules for Public Access:

- Do not discuss commission business with a majority outside a noticed public meeting
- No serial meetings directly with other members or indirectly through intermediaries
- Use caution with “reply all” and social media
- During meetings, do not discuss anything not on the agenda

- a. **DA10-001 (Administrative Hearing):** This is the annual compliance review hearing for the Cisco Systems Development Agreement. The City Council adopted this Development Agreement in 2010, which allows the development of 150,000-2.5 million square feet of office/R&D space over the term of the agreement, for the 137-acre site located at 3550 Cisco Way (Cisco Technology Inc., Owner). Council District: 4. **CEQA:** The annual Development Agreement compliance review involves no new physical development or new uses on the property and is therefore not considered a “Project” under the California Environmental Quality Act.

PROJECT MANAGER, PATRICK KELLY

Staff recommends that the Planning Commission:

1. Adopt a resolution pursuant to San José Municipal Code Section 18.02.300.E certifying the developer is in compliance with the terms and conditions of the Development Agreement between the City of San José and Cisco Technology, Inc. (“Cisco”) dated September 2, 2010 (File No. DA10-001) for the annual compliance review period of July 1, 2022 through June 30, 2023, for the up to 2.5 million-square foot research and development office project on the 137-gross acre site located on the north and south sides of East Tasman Drive, east of Zanker Road.



RESIDENTS

BUSINESSES

JOB

YOUR GOVERNMENT

NEWS & STORIES

TOP REQUESTED



Make a Payment



Free Junk Pickup



Apply for Building Permit

How may I help you?



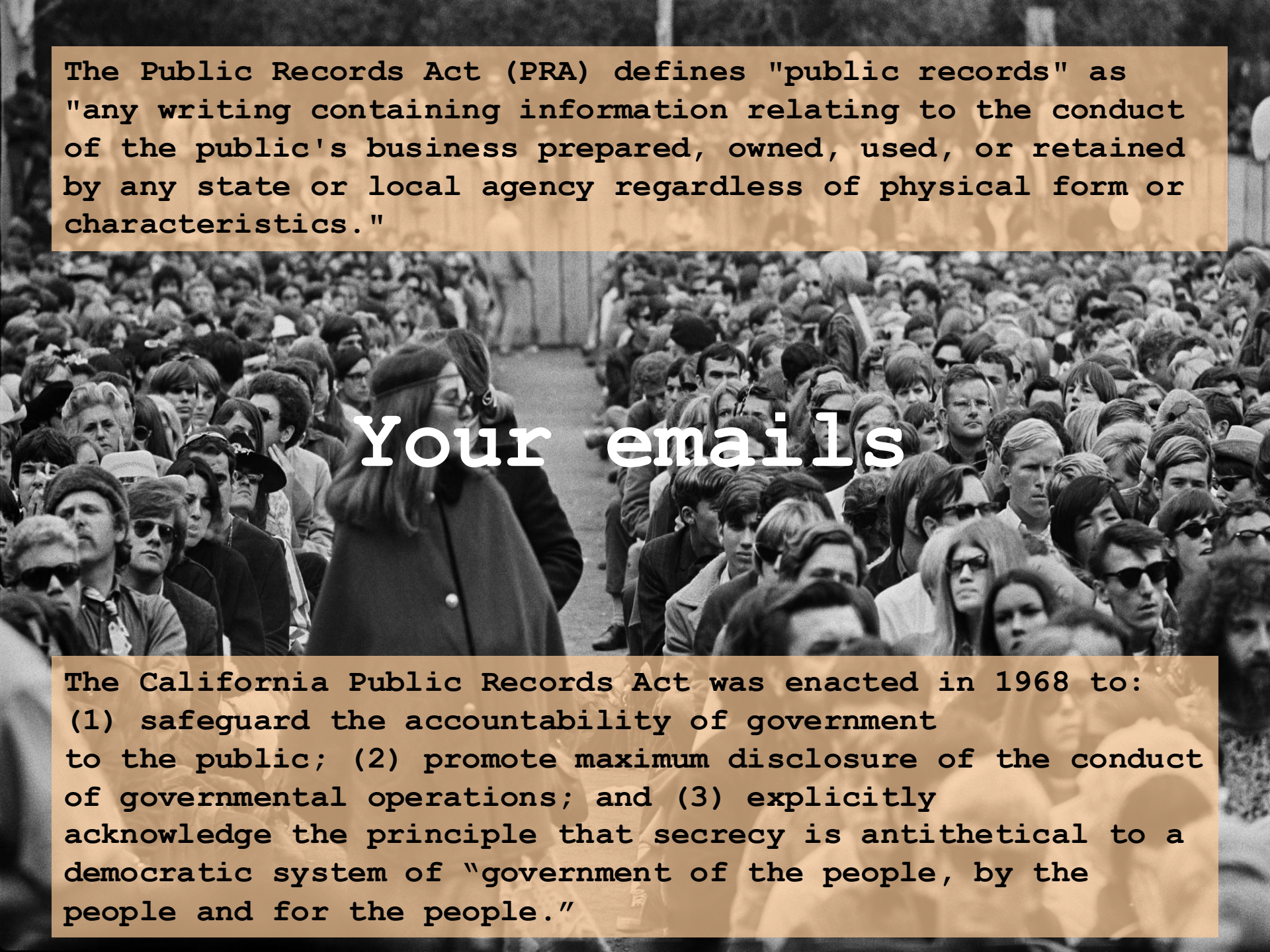
Teleconference Rules:

- **Attending meetings via teleconference is limited and only reserved for cases of emergency or some other “just cause”**
- **You will need to give a general description of the circumstance to the commission to justify your absence**
- **Your remote participation requires a simple majority vote of at the beginning of the meeting in favor of your participation**

Brown Act Violations:

- **Anyone can sue to challenge an action taken by a body in violation of the Brown Act**
- **Upon a successful challenge, the action can be invalidated**
- **Potential criminal penalties exist for those members who knowingly participate in a meeting that violates the Brown Act with the intent to deprive the public of information**

THE PUBLIC RECORDS ACT



The Public Records Act (PRA) defines "public records" as "any writing containing information relating to the conduct of the public's business prepared, owned, used, or retained by any state or local agency regardless of physical form or characteristics."

Your emails

The California Public Records Act was enacted in 1968 to:

- (1) safeguard the accountability of government to the public;
- (2) promote maximum disclosure of the conduct of governmental operations; and
- (3) explicitly acknowledge the principle that secrecy is antithetical to a democratic system of "government of the people, by the people and for the people."

San Jose Mercury News

BAY AREA NEWS GROUP || 27 MILLION READERS IN PRINT & ONLINE
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MONDAY, APRIL 4, 2016

24/7 COVERAGE ONLINE: WWW.MERCURYNEWS.COM || \$1.50

Local Commissioner Calls New Project “Big Waste of Time.”



By [Chester Copperpot](#)
Bay Area News Group

The Bay Area News Group obtained city records through a Public Records Act request that detailed how one certain commissioner feels about the popular new project downtown. The commissioner has been meeting with neighbors and even went as far as to suggest the developer of the new project is an “idiot” and the project is a “joke.” The mayor responded quickly to

**POLICIES
AND
BYLAWS**



RESIDENTS

BUSINESSES

JOB

YOUR GOVERNMENT

NEWS & STORIES

TOP REQUESTED



Make a Payment



Free Junk Pickup



Apply for Building Permit

How may I help you?



COUNCIL POLICY

TITLE CITY COUNCIL/COMMISSION CODE OF CONDUCT	PAGE 1 of 4	POLICY NUMBER 0-36
EFFECTIVE DATE June 19, 2007	REVISED DATE September 27, 2011	
APPROVED BY COUNCIL ACTION June 19, 2007, Item 2.5, Resolution No. 73839; September 27, 2011, Item 3.7(b), Resolution No. 76037		

TITLE Consolidated Policy Go Boards and Commissio

EFFECTIVE DATE August 2

APPROVED BY COUNCIL AC Item 7d(4); November 20, 1991, 1991, Item No. Item 7d(4); N

TITLE TITLE CODE OF ETHICS OFFICIALS AND EMPLO CITY OF SAN JOSE

EFFECTIVE DATE August 19, 1998

APPROVED BY COUNCIL ACTION No. 55371; 6/25/1991, Item 9(j), Re 3.3, Res. No. 78560

PURPOSE AND SCOPE

In order to best serve the citizens a and employees of the City must act fair, honest and open. City employ personal integrity, honesty and con employees.

As stated in the City Charter, "The c from all those in the public service. C in the performance of their duties a

The purpose of this Code of Ethn behaviors for use by and applicabl Commission members, and employ also observe the provisions of this ;

For additional regulations regarding

POLICY

Elected and appointed officials and trust. City officials and employees a The citizens and customers of San. in public service, regardless of pers

1. **Responsibilities of Public**

City officials and employee Constitution of the State c policies. Recognizing the sp officials and employees are they are expected to treat a concern and responsivene; private affairs should be abx

2. **Access to City Governme**

The City of San José is cc meet the community's expe manner. City employees a conducting activities in full Open Government and Ethn

BACKGROUND

This policy consolidates C Policies) and Council Policy Council Policy 0-20 (Appoin and Commissions), and for Commissions and Commit Council Policies 0-15 (Code Jose). It is intended as a c and Commissions and upd; approved by City Council on

City of San Jose Boards independent recommendati such as the Planning Comn and Political Practices, and and take administrative acti by being visible in the comn process.

The City Charter provides established by the City Ch; Commissions as in its judg and duties as are consistent policies and customs as rela

This Policy only applies to B the City Council pursuant to it does not apply to the ; Compensation Advisory Co; Retirement Board, Police an

PURPOSE

City Boards and Commissions are formed in order to provide independent recommendations to Council or, in the context of quasi-judicial boards such as the Planning Commission, Civil Service Commission, Elections Commission and Appeals Hearing Board, to make independent decisions and take administrative actions (also called "quasi-judicial actions"). The Commissions play an important role by being visible in the community and bringing a broad representation of ideas into the process.

This Policy is adopted with the intent of formalizing the need for independent advice and decision making by the Commissions as well as to ensure a clear understanding of the role of the Commissioners by all who participate in the governmental process. References to "Commissions" in this Policy includes City Commissions, and Boards which are subject to the Brown Act (Gov. Code Sections 54950 - 54962.) This Policy does not apply to task forces or ad hoc committees.

POLICY

A. Council Liaisons

The Council Liaison is the Councilmember who is specifically assigned to be the liaison between the City Council and the Commission. The primary role of the Liaison is that of facilitator of communications between the Commission and the Council. A Councilmember who is appointed to sit as a member of a Board or Commission is not a liaison for purposes of this Policy.

1. **Definition of the Role**

The Council Liaison shall facilitate communications between the Commission and the Council. The Liaison should not be an advocate for the Commission, give direction or influence a decision of the Commission. The Liaison may, however, assist and provide guidance to Commissions with their workplans or agendas.

2. **Purpose**

The Liaison acts as:

- a. Spokesperson on behalf of the Council when so directed by the Council.
- b. Contact person, if the Commission or an individual Commissioner wants such a channel of communication.
- c. Monitor the Commission to identify procedural and structural issues relating to the effective functioning of the Commission for Council.

3. **Participation Expectation**

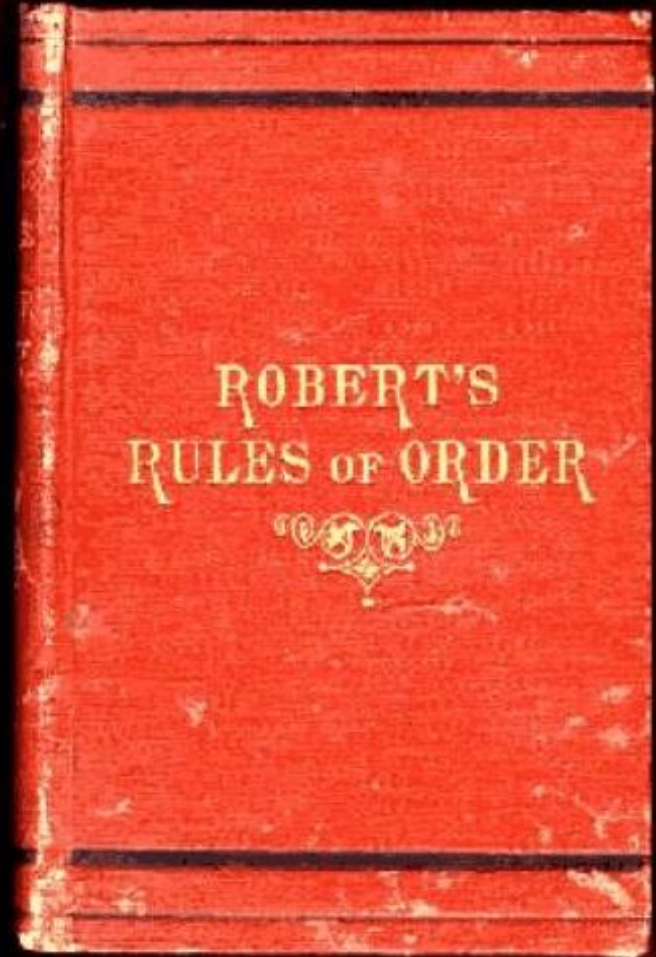
- a. Attendance is discretionary with the Councilmember - attendance at Commission meetings is not required but is encouraged.

Key Provisions from Policy 0-36:

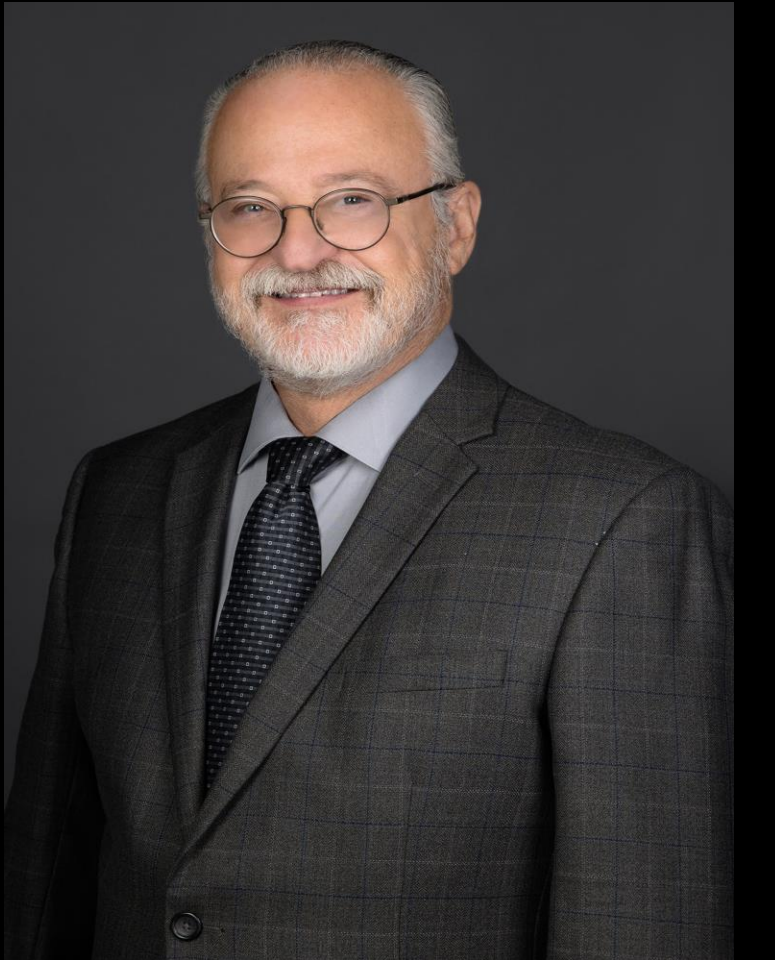
- **Make very clear you are speaking in your personal capacity when speaking or writing publicly on matters within the purview of the commission, unless authorized to speak on the commission's behalf**
- **Do not use your commission title, unless you are speaking on the commission's behalf**
- **Commissions may not independently support or oppose state or federal legislation but shall be free to make recommendations on such legislation to the City Council through the Rules Committee**

**RULES
OF
ORDER**

Robert's Rules of Order



Rosenberg's Rules of Order



Dave Rosenberg SUPERIOR COURT JUDGE



"Rosenberg's Rules of Order, Revised"

*(Simple Rules of Parliamentary Procedure for the 21st Century)
By Judge Dave Rosenberg
(First Revision dated July 2011)*

Introduction

The rules of procedure at meetings should be simple enough for most people to understand. Unfortunately, that has not always been the case. Virtually all clubs, associations, boards, councils and bodies follow a set of rules – "Robert's Rules of Order" – which are enshrined in a small, but complex, book. Virtually no one I know has actually read this book cover to cover. Worse yet, the book was written for another time, and for another purpose. If one is chatting or running a Parliamentary, then "Robert's Rules of Order" is a dandy and quite useful handbook for procedure in one-on-one settings. On the other hand, if one is running a meeting of, say, a 50-member body with a few members of the public in attendance, a simplified version of the rules of parliamentary procedure is in order.

Hence, the title of "Rosenberg's Rules of Order."

What follows is my version of the rules of parliamentary procedure, based on my 20 years of experience creating meetings in state and local government. These rules have been simplified for the smaller public body chair or in which we are engaged, streamlined down for the 21st Century, yet retaining the basic tenets of order to which we have grown accustomed. Importantly though, Rosenberg's Rules has found a welcoming audience. Hundreds of cities, counties, special districts, committees, boards, commissions, neighborhood associations and a number of corporations and companies have adopted Rosenberg's Rules in lieu of Robert's Rules because they have found them succinct, logical, simple, easy to learn, and user-friendly.

The concept of modern parliamentary procedure is built on a foundation established by the following four pillars: (1) Rules should establish order. The first purpose of rules of parliamentary procedure is to establish a framework for the orderly conduct of meetings. (2) Rules should be clear. Since the rules tend to be user-unfriendly and archaic, complex rules create two classes: those who understand and participate, and those who do not fully understand and do not fully participate. (3) Rules should be user-friendly. There is one rule that must be simple enough that the public is invited into the body and feels that it has participated in the process. (4) Rules should enforce the will of the majority while protecting the rights of the minority. The ultimate purpose of rules of procedure is to encourage discussion and to facilitate decision-making by the body. In a democracy, majority rules. The rules must enable the majority to proceed itself and fabricate a result, while protecting the minority to also express itself, but not dominate, and fully participate in the process.

Establishing a Quorum

The starting point for a meeting is the establishment of a quorum. A quorum is defined as the minimum number of members of the body who must be present at a meeting for business to be legally conducted. The default rule is that a quorum is one more than half the body. So, for example, in a five-member body a quorum is three. When the body has three members present, it can legally conduct business. If the body has less than a quorum of members present, it cannot legally conduct business. And even if the body has a quorum to begin the meeting, the body can lose the quorum during the meeting when a member departs (or even when a member leaves the table), and when that occurs, the body loses its ability to conduct business until and unless a quorum is reestablished.

The default rule, identified above, however, gives way to a specific rule of the body which establishes a quorum. So, for example, the rules of a particular five-member body may indicate that a quorum is four members for that particular body. The body must follow the rule it has established for its quorum. In the absence of such a specific rule, the quorum is one more than half the members of the body.

The Role of the Chair

While all members of the body should know and understand the rules of parliamentary procedure, it is the Chair of the body who is charged with enforcing the rules in the conduct of the meeting. The Chair should be well-versed in those rules. The Chair, for all intents and purposes, makes the final ruling on the rules every time the Chair speaks an action. In fact, objections by the Chair are final unless overruled by the body itself.

Since the Chair runs the conduct of the meeting, it is usual courtesy for the Chair to play a less active role in the debate and discussion than other members of the body. This does not mean that the Chair should not participate in the debate or discussion. To the contrary, the Chair as a member of the body has the full right to participate. In the debate, discussion and decision-making of the body. Where the Chair should do, however, is to be to the last to speak at the discussion and debate stage, and the Chair should not raise or second a motion unless the Chair is convinced that no other member of the body will do so at that point in time.

The Basic Format for an Agenda Item Discussion

Formal meetings normally have a written, often published agenda. Informal meetings may have only an oral or understood agenda. In either case, the meeting is governed by the agenda and the agenda constitutes the body's agreed-upon roadmap for the meeting. And each agenda item can be handled by the Chair in the following basic format:

First, the Chair should clearly announce the agenda item name and should clearly state what the agenda item is about. The Chair should also announce the format (which follows) that will be followed in considering the agenda item.

PLANNING C

**A RESOLUTION
OF THE CITY
THE CONDUCT**

L

Section 1. Officers, Enum

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Section 2. Officers, Electi

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Section 3. Chairperson ar

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Section 4. Chairperson, Q

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Section 5. Chairperson, P

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Section 9. Motions, Debate Thereof, Debate Limited to Members of Commission

No debate of a motion shall be permitted prior to a second of the motion. When a motion is made and seconded, it shall be stated by the Chairperson before being debated; and such debate shall be limited to members of the Commission only. Members of the Commission may speak in debate of a motion only upon addressing the Chairperson and being recognized by the Chairperson. After the Chairperson has started to take the vote on the motion there shall be no further debate except that members of the Commission may be allowed to explain their vote, or present appropriate motions as governed by Rosenberg's Rules of Order.

Section 10. Voting; Ayes and Noes

(a) Every member of the Commission who is present at a meeting when a motion comes up for vote shall vote for or against the motion unless the Commissioner has been recused from voting for any legal reason and abstains from voting because of such declared recusal.

(b) All voting by Commission members shall be by roll call vote, or electronic vote, and the vote or abstention on that action of each member present for the action shall be entered by the Secretary in the public record of the Commission proceedings.³

Section 11. Petitions and Communications; Filing, Report, and Inspection Thereof

All written petitions and communications on the agenda of a meeting shall be filed with the Commission at such meeting and shall be so marked by the Secretary. The substance of such petitions and communications shall be orally reported to the Commission by the Secretary; provided that upon the request of any member of the Commission present at the meeting, any such petition or communication shall be read aloud in its entirety by the Secretary. Such petitions and communications may be inspected at any time by any member of the Commission.

Section 12. Documents and Objects Presented to Commission; Filing and Inspection Thereof

All documents and all physical objects presented to the Commission at any meeting by any person (including, but not limited to, those presented by the City Council or by boards, commissions, officers, or departments of the City) shall be filed with the Commission at such meeting and shall be

³ See Government Code section 54953(c)(2).

CONFLICTS OF INTEREST

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

- State
- Multi-County _____
- City of _____
- Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- County of _____
- Other _____

3. Type of Statement (Check at least one box)

- Annual: The period covered is January 1, 2022, through December 31, 2022.
- or-
- The period covered is ____/____/____, through December 31, 2022.
- Assuming Office: Date assumed ____/____/____
- Candidate: Date of Election _____ and office sought, if different than Part 1: _____
- Leaving Office: Date Left ____/____/____ (Check one circle.)
- The period covered is January 1, 2022, through the date of leaving office.
- or-
- The period covered is ____/____/____, through the date of leaving office.

4. Schedule Summary (required)

► Total number of pages including this cover page: _____

Schedules attached

- Schedule A-1 - Investments – schedule attached
- Schedule A-2 - Investments – schedule attached
- Schedule B - Real Property – schedule attached
- Schedule C - Income, Loans, & Business Positions – schedule attached
- Schedule D - Income – Gifts – schedule attached
- Schedule E - Income – Gifts – Travel Payments – schedule attached

-or- None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS
()

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ Signature _____
(month, day, year) (File the originally signed paper statement with your filing official.)

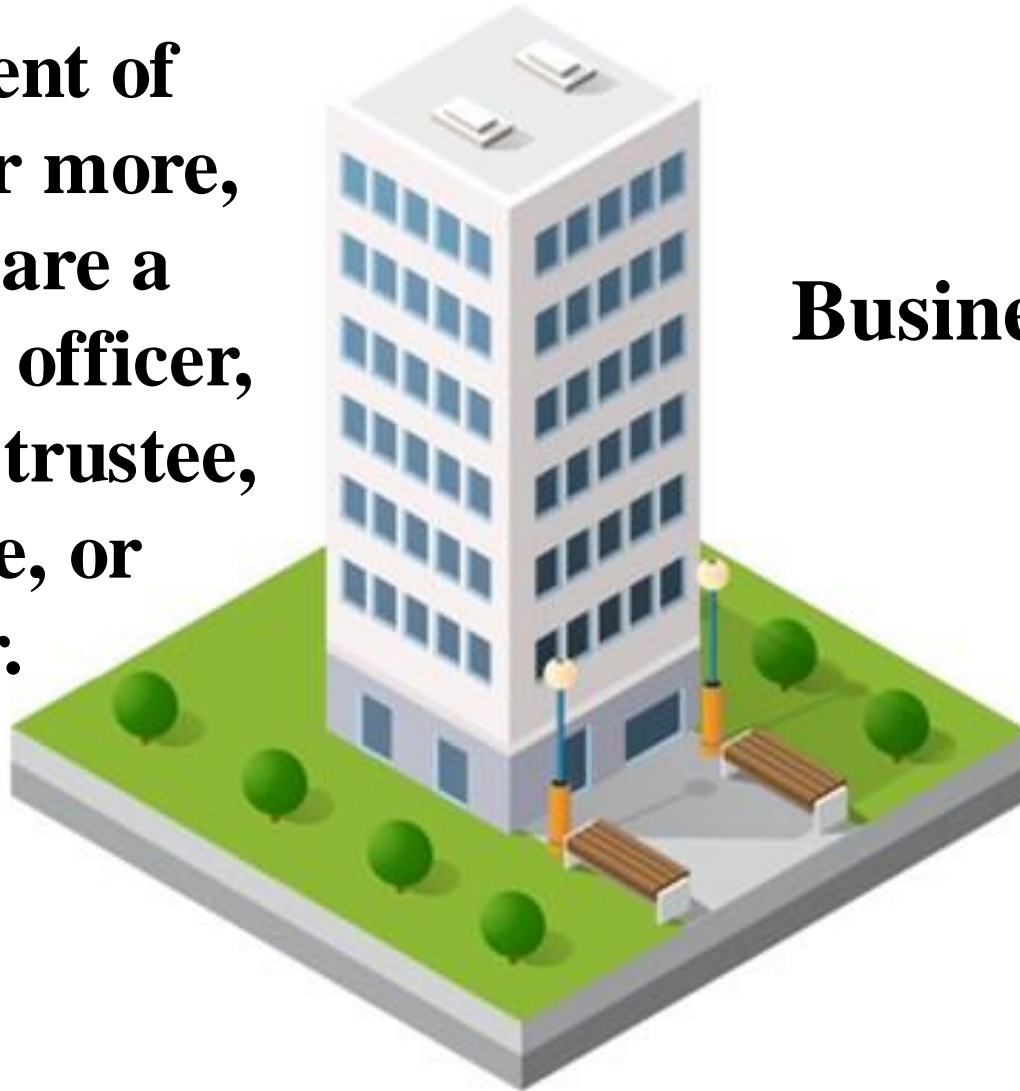
The Political Reform Act prohibits public officials from gaining financially from their public service.

Prohibited from taking action that will foreseeably impact your personal finances, sources of income, real property, or business entities in which you have investments or are involved.

- 1) Reasonably foreseeable?
- 2) Material?
- 3) Affect the general public?
- 4) Prohibited participation.

IMPACT:

Investment of \$2,000 or more, and you are a director, officer, partner, trustee, employee, or manager.



Business Entity

GIFTS:



The City of San José prohibits gifts over \$50 from restricted source

The Political Reform Act prohibits gifts totaling \$590 in one year

“WHEN IN DOUBT, SIT IT OUT”

- **If you think you have a conflict of interest, please contact the City Attorney’s Office**
- **If an upcoming decision will present a reasonably foreseeable material financial effect, then you should complete a COI Declaration (24 hrs) and recuse yourself**
- **Look to avoid the appearance of bias and even the optics of a conflict of interest**

Political Reform Act Violations:

- **Administrative proceedings by the Fair Political Practices Commission (FPPC)**
- **Criminal prosecution by a local district attorney or the state attorney general**
- **Civil action by the public, certain government agencies, or the FPPC Enforcement Division**



QUESTIONS?