

## CITY SERVICE AREA

### STRATEGIC SUPPORT



### MISSION

*To effectively develop, manage, and safeguard the City's fiscal, physical, technological, and human resources to enable and enhance the delivery of City services and projects*

#### Primary Partners

Finance  
Human Resources  
Information Technology  
Public Works

#### CSA OUTCOMES

- ❑ Sound Fiscal Management that Facilitates Meeting the Needs of the Community
- ❑ A High Performing Workforce Committed to Exceeding Internal and External Customer Expectations
- ❑ Technology and Data Tools that Enable a Collaborative, Responsive, and Productive City
- ❑ Safe and Functional Public Infrastructure, Facilities, and Equipment

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### SERVICE DELIVERY FRAMEWORK

**CITY SERVICE AREA**  
Cross-departmental core services that form one of the City's six (6) key "lines of business"

**MISSION STATEMENT**  
Why the CSA exists

**CSA OUTCOMES**  
The high-level results of service delivery sought by the CSA partners

**PRIMARY PARTNERS**  
Departments with Core Services that contribute to achievement of CSA Outcomes

**CORE SERVICES**  
Primary deliverables of the organization

## Strategic Support CSA

*Mission:*

To effectively develop, manage, and safeguard the City's fiscal, physical, technological, and human resources to enable and enhance the delivery of City services and projects

*Outcomes:*

- Sound Fiscal Management that Facilitates Meeting the Needs of the Community
- A High Performing Workforce Committed to Exceeding Internal & External Customer Expectations
- Technology and Data that Enable a Collaborative, Responsive, & Productive City
- Safe and Functional Public Infrastructure, Facilities, & Equipment

## Finance Department

*Core Services:*

Debt and Treasury Management

Disbursements

Financial Reporting

Purchasing and Risk Management

Revenue Management

## Human Resources Department

*Core Services:*

Employee Benefits

Employment Services

Health and Safety

Training and Development

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### SERVICE DELIVERY FRAMEWORK

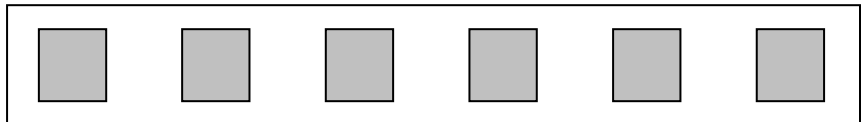
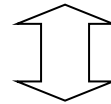
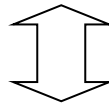
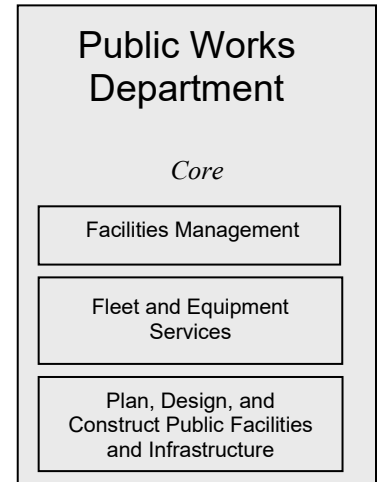
**PRIMARY PARTNERS**  
Departments with Core Services that contribute to achievement of CSA Outcomes

Residents accessing Citywide informational and business services

**CORE SERVICES**  
Primary deliverables of the organization

**PROGRAMS**  
Elements of Core Services; the "front-line" of service delivery

**STRATEGIC SUPPORT**  
Organization-wide guidance and support to enable direct service delivery



# CITY SERVICE AREA

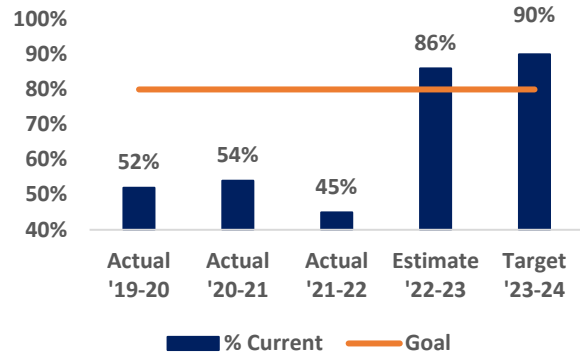
## STRATEGIC SUPPORT

### DASHBOARD

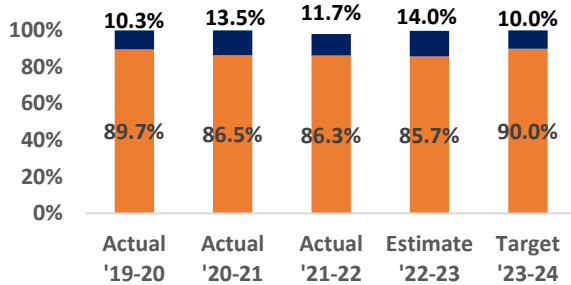
#### City's Bond Ratings (General Obligation Bond Rating)

	Moody's	Standard & Poor's	Fitch
Actual '18-19	Aa1	AA+	AA+
Actual '19-20	Aa1	AA+	AA+
Actual '20-21	Aa1	AA+	AA+
Actual '21-22	Aa1	AA+	AAA
Estimate '22-23	Aa1	AA+	AAA
Target '23-24	Aa1	AA+	AAA

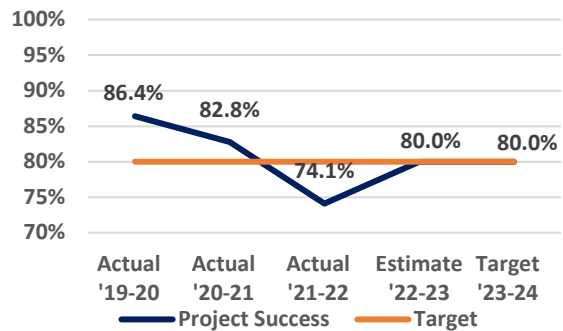
#### % of Non-Management Employee Performance Appraisals Completed on Schedule



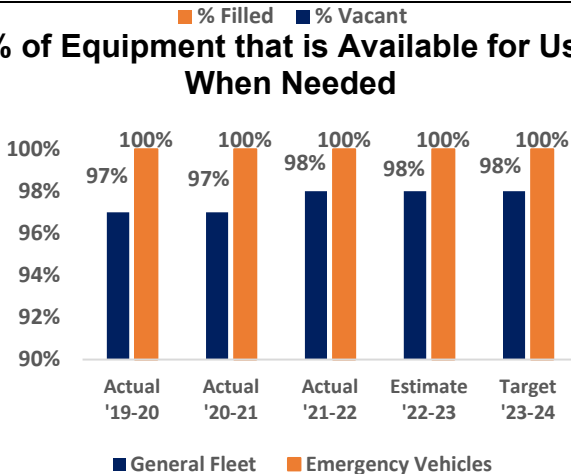
#### % of Positions Filled as a Total of Budgeted Positions



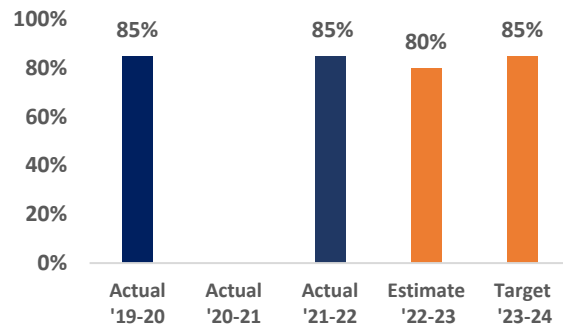
#### % of Information Technology Project Success Rate



#### % of Equipment that is Available for Use When Needed



#### % of Facilities with a Condition Assessment Rating of Good or Better<sup>1</sup>



<sup>1</sup> Data was not collected in 2020-2021 due to COVID-19 emergency work prioritization.

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### BUDGET SUMMARY

#### Expected 2023-2024 Service Delivery

- Ensure the City's financial resources are protected and available to address the short-term and long-term needs of the community; make accurate and timely payments to City employees and vendors; provide accurate and timely financial reports; and deploy efficient business systems and processes for timely billing and collection efforts.
- Attract talent; provide opportunities for career growth; enable an environment focused on health, safety, and wellness; and retain a diverse workforce in a workplace that is equitable and inclusive.
- Maintain City facilities, equipment, and vehicles, and manage space usage; oversee the City's capital projects, ensuring on-time and on-budget delivery of facilities that meet both customers and City staff needs.
- Champion equity solutions using technology and data to improve City services; provide resilient City services against cybersecurity risks and natural disasters affecting communities at increasing rates; maximize efficiencies and multiply the impact of limited resources through service innovation in partnership with City departments; support the City's transition to a digital workforce; embrace digital public participation, and augment collaboration; execute City priorities through masterful partnership and procurement; and enhance business intelligence.

#### 2023-2024 Key Budget Actions

- Continues and makes permanent 1.0 Division Manager and 2.0 Senior Analyst positions; and continues 1.0 Accountant II and 3.0 Accounting Technician positions through June 30, 2024, in the Finance Recovery-Grants program in the Finance Department.
- Adds 1.0 Enterprise Supervising Technology Analyst in the Information Technology Department and 1.0 Program Manager positions in the Finance Department on an ongoing basis, and \$50,000 of one-time non-personal/equipment funding for a feasibility assessment to support the development and subsequent implementation of the planned City of San José Enterprise Resource Planning (ERP) system.
- Continues one-time funding for 1.0 Program Manager position, 3.0 Analyst I/II positions, and 1.0 Staff Specialist position and makes 1.0 Program Manager position ongoing for the Recruitment Centralization Pilot Program in the Human Resources Department which will add capacity and provide supportive reporting relationships and drive focused recruitment efforts for three departments experiencing high levels of vacancies: the Parks Recreation and Neighborhood Services, Housing, and Planning, Building, and Code Enforcement Departments.
- Adds \$3.2 million in one-time funding for the Windows 11 Upgrade, including funding for temporary staffing and the replacement of aging desktops and laptops for multiple departments.
- Continues 1.0 Enterprise Supervising Technology Analyst position and 2.0 Senior Analyst positions and \$500,000 in the Information Technology Department to support the San José 311 program.
- Adds 1.0 Senior Carpenter, 1.0 Senior Air Conditioning Mechanic, and 1.0 Senior Electrician position to provide necessary operations and maintenance support for Measure T funded City facilities coming online.
- Adds 2.0 Communication Installer positions to address vehicle build-out and repair needs in support of the City's fleet.

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### BUDGET SUMMARY

#### City Service Area Budget Summary\*\*

	2021-2022 Actuals **	2022-2023 Adopted	2023-2024 Forecast	2023-2024 Adopted
<b>Dollars by Core Service *</b>				
<i>Finance Department</i>				
Debt and Treasury Management	5,316,774	5,705,911	5,819,562	6,044,562
Disbursements	2,881,654	3,405,509	2,980,546	3,420,545
Financial Reporting	3,215,681	4,621,937	3,681,887	4,487,586
Purchasing and Risk Management	5,621,180	7,240,753	7,198,484	7,555,781
Revenue Management	8,324,787	8,688,469	8,141,050	12,555,250
Strategic Support - Other - Strategic Support	414,411,828	48,772,243	50,922,448	50,922,448
Strategic Support - Strategic Support	1,861,624	3,632,458	1,836,702	3,454,456
<i>Human Resources Department</i>				
Employee Benefits	94,229,229	102,858,061	108,184,222	108,633,830
Employment Services	2,818,051	4,070,277	3,439,235	4,874,239
Health and Safety	6,848,575	6,534,774	6,847,355	6,847,355
Strategic Support - Other - Strategic Support	2,151,554	2,986,542	2,243,498	2,348,498
Strategic Support - Strategic Support	4,132,949	1,992,922	2,035,991	2,502,425
Training and Development	336,133	986,257	922,575	1,957,997
<i>Information Technology Department</i>				
Business Solutions	11,056,046	12,751,794	12,873,094	13,821,333
San José 311	2,264,854	2,952,990	2,223,659	3,373,658
Strategic Support - Other - Strategic Support	118,400	2,015,561	791,522	821,987
Strategic Support - Strategic Support	5,023,455	8,449,714	6,058,723	8,198,723
Technology Infrastructure and Operations	9,633,308	13,778,990	11,887,478	16,992,122
<i>Public Works Department</i>				
Facilities Management	34,306,976	34,419,769	32,467,003	37,239,632
Fleet and Equipment Services	25,365,154	31,124,369	31,926,465	43,865,142
Plan, Design, and Construct Public Facilities and Infrastructure	34,409,977	45,695,937	48,007,681	48,776,496
Strategic Support - Other - Strategic Support	26,635,059	46,088,760	23,061,989	60,637,545
Strategic Support - Strategic Support	22,032,121	12,607,379	12,497,690	13,057,455
<b>Dollars by Core Service Subtotal</b>	<b>\$722,995,370</b>	<b>\$411,381,376</b>	<b>\$386,048,859</b>	<b>\$462,389,065</b>
<b>MAYOR, CITY COUNCIL, AND APPOINTEES</b>	<b>\$83,927,696</b>	<b>\$112,585,389</b>	<b>\$85,548,374</b>	<b>\$120,700,808</b>
<b>Total CSA</b>	<b>\$806,923,066</b>	<b>\$523,966,765</b>	<b>\$471,597,233</b>	<b>\$583,089,873</b>

\* Fund Balance, Transfers, and Reserves for funds that may be managed by the departments in this CSA have been excluded from this display. This information can be found in Source and Use of Funds Statements elsewhere in this document.

\*\* The positions displayed in the 2021-2022 Actuals column reflect those included in the 2021-2022 Adopted Budget. 2021-2022 Actuals may not subtotal due to rounding.

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### OVERVIEW

#### Service Delivery Accomplishments

- For the first time in 12 years, the City received a Report to Those Charged with Governance with no new findings and fully corrected prior year findings – both a “clean” *Annual Comprehensive Financial Report* and a “clean” federal *Single Audit Report*.
- On November 30, 2022, the City sold \$268,355,000 of City of San José Financing Authority Wastewater Revenue Bonds, Series 2022B (Green Bonds – Climate Bond Certified), of which nearly \$25 million was purchased by Environmental, Social, and Governance funds. The City’s first issuance of Green Bonds was assigned the highest rating of AAA by three of the major national bond rating agencies – Standard & Poor’s Global Ratings, Fitch and KBRA (Kroll).
- The Learning and Development team provided a City-wide Training and Development program under the City Manager’s “Powered by People” initiative. Through Powered by People the team focused on training opportunities that include Human Centered Design Learning Lab, Employee Experience Conversations, and Innovation Academy, to name a few. The Learning and Development team provided training opportunities (of various lengths and types) to more than 800 employees.
- Facilities Management has provided proactive and reactive support to critical City facilities and field operations throughout the pandemic and the expansion of in-person/virtual hybrid events.
- The Center for Digital Government recognized the City of San José for Project Experience Awards for San José 311 Services for Equity and Accessibility that included deployment of five new services (Affordable Housing, Community WiFi, Illegal Fireworks, Eviction Prevention, and Utility Bill Payment). Government Technology recognized the City as having the best privacy program in California due to its review framework and resident engagement on public interest technology.

#### Service Delivery Environment

- Focus on the City’s Powered by People enterprise priority and objectives to Nurture Employee Growth, Safety, and Wellness which will result in attracting, retaining, and engaging a diverse workforce with opportunities to thrive and serve residents while keeping employees safe and supported in a flexible work environment.
- The City’s building inventory was expanded during the “decade of investment”. Many of the equipment within these newer facilities are reaching the end of their lifespan, requiring increased maintenance.
- The City advanced resident relationship/response services with San José 311, continued to strengthen its cybersecurity program, implemented a City-wide Digital Privacy program in partnership with City departments, and concluded the 2021-2023 IT Strategic Plan with unanimous acceptance by City Council. ITD is in the process of developing a new IT Strategic Plan for the upcoming years. ITD attained an 74% project success rate, 91% customer satisfaction rate, and ~99.6% uptime and availability rate across its hardware and software services portfolio.
- Maintain favorable bond ratings to ensure lowest cost of capital, provide financial modeling and analysis to meet the increasingly complex needs of the City, ensure effective management of the City’s investment portfolio, revenue collected, accounting functions, purchasing and risk management programs, and ensure timely disbursements to vendors and employees.

## CITY SERVICE AREA

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### STRATEGIC SUPPORT

#### OVERVIEW

##### CSA Priorities/Key Services

- Provide compensation and payments to City employees and vendors in a timely and accurate manner; produce legally required compliance and regulatory information and financial reports; manage multi-billion-dollar debt and investment portfolios; bill and collect City revenues; and procure goods and services pursuant to City policies through open and competitive processes.
- Continue to reduce vacancies by evaluating, streamlining, and innovating for effective hiring practices and building long-term capacity through strategic pipeline programs.
- Maintain City-owned facilities and equipment to ensure public and employee safety and maximize the functionality of the City's assets; and provide quality capital project delivery.
- Enable departments to deliver superior municipal services and efficiencies with equity to beautify and improve the City.
- Provide an ecosystem of secure, resilient, and friendly information and communications systems, and deliver digital inclusion, housing, parks and recreation, racial equity, development services, and related projects and systems.
- Advance new San José 311 services and accessibility for residents and businesses and centralize services on the platform.
- Improve remote collaboration and digital-first service options to support a more digital workforce and digital public.
- Manage growing cybersecurity risks and promote partnership and collaboration among departments.



# CITY SERVICE AREA

## STRATEGIC SUPPORT

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### OUTCOME 1: A HIGH PERFORMING WORKFORCE COMMITTED TO EXCEEDING INTERNAL AND EXTERNAL CUSTOMER EXPECTATIONS

Strategic Goals	CSA Performance Measures	2021-2022 Actuals	2022-2023 Target	2022-2023 Estimate	2023-2024 Target	5-Year Goal
Develop and encourage supervisors and managers that support a high-performing workforce	1. % of employee performance appraisals completed on schedule	45% <sup>1</sup>	80%	86%	90%	98%
Attract, hire, and retain employees	1. Citywide vacancy rate	11.7%	10%	14.0%	10%	9%
Provide the necessary and required safety & health services that ensure employee health, safety and well-being	1. # of open Workers' Compensation claims	2,575	2,600	2,571	2,650	2,300
Foster a shared vision with employees about the characteristics of a high-performing workforce	1. % of the public having contact with City employees who are satisfied or very satisfied with the: <ul style="list-style-type: none"> <li>- timeliness of City employees</li> <li>- courtesy of City employees</li> <li>- competency of City employees</li> </ul>	60.4%	70%	N/A <sup>2</sup>	70%	83%
		74.7%	70%	N/A <sup>2</sup>	75%	83%
		54.6%	70%	N/A <sup>2</sup>	70%	83%

<sup>1</sup> The 2021-2022 Actuals continued to track lower due to returning from COVID-19 pandemic.

<sup>2</sup> Data for this measure is collected through the annual City-Wide Community Survey. The next survey will be issued late summer, which is after the publication of this budget document. However, 2022-2023 community survey data will be reported as part of the City Auditor's Annual Report on City Services for 2022-2023 and as 2022-2023 Actuals in the 2024-2025 Proposed Budget. The next community survey will be conducted in late summer 2023.

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

### OUTCOME 2: SAFE AND FUNCTIONAL PUBLIC INFRASTRUCTURE, FACILITIES, AND EQUIPMENT

Strategic Goals	CSA Performance Measures	2021-2022 Actuals	2022-2023 Target	2022-2023 Estimate	2023-2024 Target	5-Year Goal
Provide well-maintained facilities that meet customer needs	1. % of facilities with a condition assessment rating of good or better (3 or better on a 5-point scale)	85%	85%	80%	85%	85%
	2. % of customers who rate facility services as good or excellent based on timeliness of response and quality of work	76%	85%	N/A <sup>1</sup>	85%	85%
	3. % of health & safety concerns mitigated within 24 hours	97% <sup>2</sup>	100%	80% <sup>2</sup>	100%	100%
Provide and maintain equipment that meets customer needs	1. % of equipment that is available for use when needed:					
	• Emergency Vehicles	100%	100%	100%	100%	100%
	• General Fleet	98%	98%	98%	97%	97%
	2. % of fleet in compliance with replacement cycle:					
	• Emergency Vehicles	100%	100%	100%	100%	100%
• General Fleet	83%	83%	83%	83%	85%	

<sup>1</sup>Data anticipated to be unavailable due to issues with collecting survey data from customers.

<sup>2</sup>Some work orders had been miscategorized as Priority One (those with health and safety concerns), causing the metric to track below its standard of 100%. Public Works continues to respond to all health and safety emergencies within 24 hours.

### OUTCOME 3: EFFECTIVE USE OF TECHNOLOGY

Strategic Goals	CSA Performance Measures	2021-2022 Actuals	2022-2023 Target	2022-2023 Estimate	2023-2024 Target	5-Year Goal
Deploy technology resources effectively	1. % of customers rating services as "Good" or "Excellent"					
	-IT Overall	91.28%	≥80%	85%	≥80%	≥80%
	-Business Solutions	91.72%	≥80%	85%	≥80%	≥80%
	-Strategic Support	92.58%	≥80%	85%	≥80%	≥80%
	-Technology Infrastructure and Operations	87.87%	≥80%	85%	≥80%	≥80%
	-Help Desk	88.49%	≥80%	85%	≥80%	≥80%
	-Products-Projects Management	89.39%	≥80%	85%	≥80%	≥80%
	2. Uptime and availability					
	-Business applications	99.03%	≥99.9%	98.9%	≥99.9%	≥99.8%
	-Systems	99.87%	≥99.9%	99.7%	≥99.9%	≥99.8%
	-Network	99.91%	≥99.9%	99.7%	≥99.9%	≥99.8%
	3. % of project success (schedule, cost, scope, value)					
			74.14%	≥80%	80%	≥80%

# CITY SERVICE AREA

## STRATEGIC SUPPORT

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### OUTCOME 4: SOUND FISCAL MANAGEMENT THAT FACILITATES MEETING THE NEEDS OF THE COMMUNITY

Strategic Goals	CSA Performance Measures	2021-2022 Actuals	2022-2023 Target	2022-2023 Estimate	2023-2024 Target	5-Year Goal
Maintain City's bond ratings <sup>1</sup>	1. City's bond ratings: (General Obligation Bond Rating) • Moody's • Standard & Poor's • Fitch	Aa1 AA+ AAA	Aa1 AA+ AAA	Aa1 AA+ AAA	Aa1 AA+ AAA	Aa1 AA+ AAA
Improve and protect the financial management system and have it available to address short- and long-term needs	1. % of vendor disbursements paid accurately and timely 2. % of payroll disbursements paid accurately and timely	91% 99%	85% 99%	91% 99%	91% 99%	90% 99%
Ensure customers have the financial information they need to make informed decisions	1. % of financial reports that are produced on time	98%	99%	98%	99%	99%

<sup>1</sup> The City's general credit rating is rated Aa1/AA+/AAA by all three leading national rating agencies, Moody's, Standard & Poor's, and Fitch, respectively. The Finance Department will continue efforts to maintain favorable bond ratings.

**CITY SERVICE AREA  
STRATEGIC SUPPORT**

**ADOPTED BUDGET CHANGES**

Adopted Changes	Positions	All Funds (\$)	General Fund (\$)
<b>FINANCE DEPARTMENT</b>			
• Disaster Recovery and Grants Management Staffing	7.00	1,254,483	1,254,483
• Enterprise Resource Planning Replacement Project Management Staffing	1.00	201,694	201,694
• Finance Fee Revenues: Licenses and Permits		0	0
• California Network and Telecommunications (CalNet) Program Savings		(4,047)	(4,047)
• Risk Management Staffing		(7,380)	(7,380)
• Accounts Receivable Staffing (Emergency Medical Services Field Coordinator Staffing Realignment)		(67,500)	(67,500)
• Rebudgets		1,335,200	1,232,200
<i>Subtotal</i>	8.00	2,712,449	2,609,449
<b>HUMAN RESOURCES DEPARTMENT</b>			
• Recruitment Centralization Pilot Program	6.00	1,001,182	1,001,182
• Pipeline Development Staffing (Recruiting Investment)	3.00	478,797	478,797
• Employee Training and Development Staffing	1.00	406,625	406,625
• Classification and Compensation Staffing	2.00	355,931	355,931
• Executive Staffing - Recruitment and Retention	1.00	298,461	298,461
• California Network and Telecommunications (CalNet) Program Savings		(5,027)	(5,027)
• Rebudgets		377,890	377,890
<i>Subtotal</i>	13.00	2,913,859	2,913,859
<b>INFORMATION TECHNOLOGY DEPARTMENT</b>			
• Windows 11 Upgrade, Equipment, and Resources		3,186,000	2,738,000
• Information Technology Staffing for Budget Office, Clean Energy, and Finance Revenue Management Support Staffing	2.00	318,855	159,427
• Homeless Encampment Management System		250,000	250,000
• PeopleSoft Upgrade		195,000	195,000
• Enterprise Resource Planning Replacement Project Management Staffing	1.00	159,427	159,427
• Mobile Device Management Platform Migration		76,000	22,040
• Development Services Dues & Subscriptions		23,400	0
• Customer Services Vision and Standard Staffing	1.00	0	0
• Information Technology Recruitment Staffing	1.00	0	0
• San José 311 Program	3.00	0	0

**CITY SERVICE AREA  
STRATEGIC SUPPORT**

**ADOPTED BUDGET CHANGES**

<b>Adopted Changes</b>	<b>Positions</b>	<b>All Funds (\$)</b>	<b>General Fund (\$)</b>
• California Network and Telecommunications (CalNet) Program Savings		(37,119)	(37,119)
Information Technology Staffing (Emergency)		(65,607)	(65,607)
• Medical Services Field Coordinator Staffing Realignment)			
• Mobile Device Management Savings		(124,000)	(124,000)
• Rebudgets		1,869,560	1,869,560
<i>Subtotal</i>	8.00	5,851,516	5,166,729
<b>PUBLIC WORKS DEPARTMENT</b>			
• Inventory Purchases		1,685,000	0
• Public Works Department Staffing Plan - Development Fee Program	2.00	463,153	0
• Measure T Operations and Maintenance Staffing Service/Licensing, and Medical Services)	3.00	460,695	460,695
• GIS Enterprise Aerial Contract		232,000	232,000
• Fleet Staffing (Communications Installers)	2.00	229,677	
• Storm and Sanitary Sewer Infrastructure and Regulatory Investment Needs		200,000	50,000
• Administration Division Staffing	0.90	138,532	48,844
• Library Facilities Staffing (1.0 Maintenance Worker from Library Department)	1.00	119,142	0
• Public Works Department Staffing Plan - Capital Improvement Program	1.20	105,658	0
• Information Technology Services Support Staffing	0.84	94,218	36,112
• Workers' Compensation, Health and Safety Staffing	0.75	79,641	0
• Vehicle M&O (Fleet Staffing)		50,042	50,042
• Measure E - Interim Housing Site Development Staffing	2.00	0	0
• California Network and Telecommunications (CalNet) Program Savings		(34,671)	0
<i>Subtotal</i>	13.69	3,823,087	877,693
<i>Subtotal Departments</i>	<b>42.69</b>	<b>15,300,912</b>	<b>11,567,730</b>
<b>MAYOR, CITY COUNCIL, AND APPOINTEES</b>			
Approved changes appear in the next section of this document	<b>17.00</b>	<b>171,792,430</b>	<b>172,230,135</b>

**CITY SERVICE AREA  
STRATEGIC SUPPORT**

**ADOPTED BUDGET CHANGES**

Adopted Changes	Positions	All Funds (\$)	General Fund (\$)
<b>CITY-WIDE EXPENSES</b>			
• Measure E - Interim Housing Site Development Staffing		2,006,789	2,006,789
• Measure E - Interim Housing Maintenance (15% HSP)		2,000,000	2,000,000
• ESUHSD Community WiFi Network Maintenance		941,368	941,368
• San José 311 Program		500,000	500,000
• Enterprise Resource Planning Replacement Project Management Staffing		50,000	50,000
• Rebudgets		10,435,500	10,435,500
<b>GENERAL FUND CAPITAL, TRANSFERS AND RESERVES</b>			
• Capital Contributions: Center for Performing Arts Chiller, Cooling Tower, and Boilers Replacement		7,600,000	7,600,000
• Capital Contributions: San José Museum of Art Cooling Tower Replacement		2,850,000	2,850,000
• Capital Contributions: 280 Almaden Ave Beautification Improvement Project		1,850,000	1,850,000
• Capital Contributions: The Tech Interactive Chiller and Cooling Tower Replacement		1,200,000	1,200,000
• Capital Contributions: City Facilities Security Enhancements		1,000,000	1,000,000
• Capital Contributions: Animal Care and Services - Various Improvements		500,000	500,000
• Capital Contributions: Fleet Shop Improvements		500,000	500,000
• Capital Contributions: Children's Discovery Museum - Curb and Walkway Rehabilitation		350,000	350,000
<b>GENERAL FUND CAPITAL, TRANSFERS AND RESERVES</b>			
• Capital Contributions: Electric Vehicle Site Assessment		300,000	300,000
• Capital Contributions: Radio Service Monitors		175,000	175,000
• Capital Contributions: City Hall Backup Generator Switch Replacement		100,000	100,000
• Capital Contributions: City Hall Equipment Replacement		100,000	100,000
• Capital Contributions: African American Community Services Agency Upgrades		80,695	80,695
• Capital Contributions: City Facilities Seismic Shut-off Valves		50,000	50,000
• Capital Contributions: Hammer Theatre Center HVAC Condensing Unit Replacement		28,000	28,000
• Capital Contributions: Rebudgets		17,958,000	17,958,000
• Transfer to the Vehicle Maintenance and Operations Fund (Fleet Replacement)		3,875,000	3,875,000

**CITY SERVICE AREA  
STRATEGIC SUPPORT**

**ADOPTED BUDGET CHANGES**

<b>Adopted Changes</b>	<b>Positions</b>	<b>All Funds (\$)</b>	<b>General Fund (\$)</b>
• Transfer to the Communications C&C Tax Fund (Radio Replacements)		(250,000)	(250,000)
• Earmarked Reserves: Measure E - Interim Housing Maintenance Reserve (15% HSP)		3,000,000	3,000,000
• Earmarked Reserves: Animal Care and Services Foundation Reserve		100,000	100,000
• Earmarked Reserves: Measure T Maintenance and Operations Reserve		(463,000)	(463,000)
• Earmarked Reserves: Cultural Facilities Capital Maintenance Reserve		(1,250,000)	(1,250,000)
• Earmarked Reserves: Rebudgets		16,575,000	16,575,000
<i>Subtotal Other Changes</i>	<b>0.00</b>	<b>72,162,352</b>	<b>72,162,352</b>
<b>Total Adopted Budget Changes</b>	<b>59.69</b>	<b>259,255,694</b>	<b>255,960,217</b>

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# STRATEGIC SUPPORT

## MAYOR, CITY COUNCIL AND APPOINTEES



### MISSION

*The Mayor and City Council serve as the policy body that provides direction to the City Manager and all Council Appointees in the delivery of City services. Council Appointees support and advance the collective work of the City organization through leadership, communication, and coordination*

**Mayor and City Council**

- Office of the Mayor
- City Council
- Council General

**Office of the City Attorney**

- Legal Services

**Office of the City Auditor**

- Audit Services

**Office of the City Clerk**

- Legislative Services

**Office of the City Manager**

- City-Wide Emergency Management aligned to the Public Safety CSA
- Lead and Manage the Organization

**Office of the Independent Police Auditor**

- Core Service aligned to the Public Safety CSA

**Office of Retirement Services**

- Retirement Plan Administration

## STRATEGIC SUPPORT

### MAYOR, CITY COUNCIL AND APPOINTEES

#### BUDGET SUMMARY

##### Expected 2023-2024 Service Delivery

- The Office of the Mayor provides leadership and guidance to the City Council. Using a variety of tools to engage the public, the Office of the Mayor will continue to ensure that the City's budget reflects the community's spending priorities and major initiatives of the City, including homeless and affordable housing, public safety, battling blight, climate and seismic resilience, equitable economic recovery, and fiscal sustainability.
- The City Council will continue to exercise its power in determining policy through adoption of ordinances, resolutions, and motions, subject to the provisions of the City Charter and the State Constitution.
- The Office of the City Manager will provide strategic leadership and facilitate service delivery through executive management. The office supports the Mayor and City Council and challenges the organization to deliver high quality, cost-effective services that meet the needs of the community.
- The Office of the City Attorney will provide advice to the City, its Council, boards and commissions, and employees; will represent the same parties in all matters pertaining to their powers and duties; and will advocate, defend, and prosecute legal matters on behalf of the City.
- The Office of the City Auditor will conduct program performance audits; identify ways to increase the economy, efficiency, effectiveness, and accountability of City government; and provide independent, reliable, accurate, and timely information to the City Council and other stakeholders.
- The Office of the City Clerk will maintain compliance with open government, campaign finance, lobbyist registration, statements of economic interest, and other public disclosure requirements as well as conduct elections for City Council, Retirement Boards, Civil Service Commission, City Charter amendments, potential issuance of bonds, and ballot measures in accordance with the City Charter and the State of California elections code.
- The Office of Retirement Services will work with the Retirement Plans' actuaries to ensure the plans have adopted and implemented the most appropriate rates, assumptions, and methodologies to remove risk from the plans, decrease volatility, and reduce intergenerational shifting of liabilities.

# STRATEGIC SUPPORT

## MAYOR, CITY COUNCIL AND APPOINTEES

### BUDGET SUMMARY

#### 2023-2024 Key Budget Actions

- Adds 1.0 Associate Deputy City Attorney position to perform basic attorney work benefiting a variety of City Departments while receiving invaluable training and experience for a career in public service.
- Adds 1.0 Legal Analyst position to provide legal support for worker's compensation cases.
- Adds 1.0 Assistant City Auditor and deleted 1.0 Program Performance Auditor II position to provide additional supervisory capacity, ensure audit quality, and encourage staff retention by providing a longer career path within the Office.
- Adds 1.0 Analyst position in the Office of the City Clerk to support contract management and public records act requests.
- Adds non-personal/equipment funding in the Office of the City Clerk to provide both in-person and online Spanish and Vietnamese interpretation services for all City Council meetings and study sessions, and all City Council committee meetings.
- As directed by the Mayor's March Budget Message for Fiscal Year 2023-2024, as approved by the City Council, establishes one-time funding of \$4.0 million for the multi-year Customer Service Vision and Standards initiative focusing on cultural change, training, process re-engineering, initial centralized governance, and technology planning and pilot implementation of a centralized customer relationship management system, and adds 1.0 Assistant to the City Manager, 1.0 Senior Executive Analyst, and 1.0 Executive Analyst positions, through June 30, 2026, in the City Manager's Office of Administration, Policy & Intergovernmental Relations for project coordination and accountability, intervention and support services, and data analysis and data coordination among departments.
- As directed by the Mayor's March Budget Message for Fiscal Year 2023-2024, as approved by the City Council, allocates \$1.9 million from unallocated Measure E funds for Homelessness Coordination. Funds three limit-dated positions through June 30, 2026 in the City Manager's Office of Administration, Policy, and Intergovernmental Relations.
- As directed by the Mayor's March Budget Message for Fiscal Year 2023-2024, as approved by the City Council, adds one-time funding of \$400,000 in the Community-Based Violence project (reflected in the City-Wide Expenses section of this document) to develop a community-based approach to preventing and responding to domestic violence, in the City Manager's Office of Administration, Policy & Intergovernmental Relations.
- Continues and makes permanent 1.0 Assistant to the City Manager position, previously funded by the American Rescue Plan, and reallocates 1.0 Executive Analyst position in the City Manager's Office of Emergency Management, previously funded by the Urban Areas Security Initiative Grant, to work on the following: continuing culturally specific community outreach and resiliency efforts, creating and maintaining a citywide infrastructure focusing on a culture of safety, supporting grant writing, developing plans for Mass Care and Shelter operations and provides \$85,000 in one-time funding to conduct additional training for Emergency Operations Center staff and supplies for the Emergency Operations Center.

# STRATEGIC SUPPORT

## MAYOR, CITY COUNCIL AND APPOINTEES

### BUDGET SUMMARY

#### Mayor, City Council and Appointees Budget Summary

	2021-2022 Actuals **	2022-2023 Adopted	2023-2024 Forecast	2023-2024 Adopted
<i>Dollars by Core Service *</i>				
<i>Mayor &amp; City Council</i>				
City Council	9,667,045	12,628,333	9,868,120	12,727,420
Council General	53,885	49,670	49,670	49,670
Office Of The Mayor	5,737,688	4,691,001	4,884,455	5,152,455
<i>Office of the City Attorney</i>				
Legal Services	20,702,985	22,482,894	21,898,187	22,424,504
Strategic Support - City Council Appointees	1,769,426	1,806,517	1,818,421	1,919,016
Strategic Support - Other - Council Appointees	8,080,833	17,271,845	7,002,174	20,261,174
<i>Office of the City Auditor</i>				
Audit Services	2,423,563	3,309,166	3,238,199	3,456,225
Strategic Support - City Council Appointees	0	173,277	184,872	184,872
Strategic Support - Other - Council Appointees	439,388	0	0	0
<i>Office of the City Clerk</i>				
City Clerk Services	3,133,286	2,996,449	3,144,882	3,690,851
Strategic Support - City Council Appointees	619,074	597,740	182,597	197,596
Strategic Support - Other - Council Appointees	972,475	6,798,632	4,929,102	6,203,926
<i>Office of the City Manager</i>				
Lead & Manage The Organization	17,808,812	19,536,505	18,636,615	22,399,724
Strategic Support - City Council Appointees	2,417,104	8,283,594	589,179	5,683,473
Strategic Support - Other - Council Appointees	2,482,522	3,682,744	315,028	7,543,029
<i>Independent Police Auditor's Office***</i>				
<i>Office of Retirement Services</i>				
Retirement Plan Administration	4,738,111	5,330,188	5,765,124	5,765,124
Strategic Support - City Council Appointees	2,857,200	2,914,834	3,011,749	3,011,749
Strategic Support - Other - Council Appointees	24,300	32,000	30,000	30,000
<b>Core Service Subtotal</b>	<b>\$83,927,696</b>	<b>\$112,585,389</b>	<b>\$85,548,374</b>	<b>\$120,700,808</b>
<b>Authorized Positions****</b>	<b>247.00</b>	<b>261.00</b>	<b>254.00</b>	<b>271.00</b>

\* Fund Balance, Transfers, and Reserves for funds that may be managed by the departments in this CSA have been excluded from this display. This information can be found in Source and Use of Funds Statements elsewhere in this document.

\*\* The positions displayed in the 2021-2022 Actuals column reflect those included in the 2021-2022 Adopted Budget. 2021-2022 Actuals may not subtotal due to rounding.

\*\*\* This Independent Police Auditor's Office Core Service is aligned to the Public Safety CSA. Please refer to that section of this document for budget summary information.

\*\*\*\* Authorized Positions do not include unclassified staff for the Mayor's Office and City Council Districts.

**CITY SERVICE AREA**  
**MAYOR, CITY COUNCIL AND APPOINTEES**

**ADOPTED BUDGET CHANGES**

<b>Adopted Changes</b>	<b>Positions</b>	<b>All Funds (\$)</b>	<b>Fund (\$)</b>
<b>MAYOR AND CITY COUNCIL</b>			
• Rebudgets		3,127,300	3,127,300
<i>Subtotal</i>	0.00	3,127,300	3,127,300
<b>OFFICE OF THE CITY ATTORNEY</b>			
• Gun Violence Restraining Order Staffing	1.00	161,571	161,571
• Workers' Compensation Legal Support	1.00	156,806	156,806
• Transactional Associate Attorney Staffing	1.00	147,941	147,941
• City Attorney's Office Administrative Support Staffing	1.00	103,839	103,839
• Outside Counsel		60,000	60,000
• California Network and Telecommunications (CalNet) Program Savings		(3,246)	(3,246)
<i>Subtotal</i>	4.00	626,911	626,911
<b>OFFICE OF THE CITY AUDITOR</b>			
• Assistant City Auditor Staffing	0.00	202,798	202,798
• California Network and Telecommunications (CalNet) Program Savings		(1,486)	(1,486)
<i>Subtotal</i>	0.00	201,312	201,312
<b>OFFICE OF THE CITY CLERK</b>			
• City Council and Committee Meeting Interpretation Services		400,000	400,000
• Mayor/Council District Office Administrative Support	1.00	147,275	147,275
• California Network and Telecommunications (CalNet) Program Savings		(1,308)	(1,308)
<i>Subtotal</i>	1.00	545,967	545,967
<b>OFFICE OF THE CITY MANAGER</b>			
• Office of Communications - Communications Outreach and Engagement	1.00	262,821	262,821
• Office of Administration, Policy, and Intergovernmental Relations - Disability Community Engagement and Service Evaluation	1.00	180,000	180,000
• Executive Leadership/City Management - Administrative Support	1.00	154,817	154,817
• Office of Administration, Policy, and Intergovernmental Relations - Surveys		100,000	100,000
• Office of Administration, Policy, and Intergovernmental Relations - Agenda Services		40,000	40,000
• Office of Racial Equity - Billy DeFrank LGBTQ+ Community Center		10,000	10,000
• Executive Leadership/City Management - Ending Homelessness Executive Leadership Staffing	0.00	(437,705)	0
• Executive Leadership/City Management - Customer Service Vision and Standards	3.00	0	0

**CITY SERVICE AREA**  
**MAYOR, CITY COUNCIL AND APPOINTEES**

**ADOPTED BUDGET CHANGES**

<b>Adopted Changes</b>	<b>Positions</b>	<b>All Funds (\$)</b>	<b>Fund (\$)</b>
• Office of Administration, Policy, and Intergovernmental Relations - Measure E - Homelessness Coordination Team	3.00	0	0
• Office of Administration, Policy, and Intergovernmental Relations - Children and Youth Services Master Plan - Phase 2	1.00	0	0
• Office of Administration, Policy, and Intergovernmental Relations - Outcomes, Equity Indicators, and Performance Management	1.00	0	0
• Rebudgets	1.00	780,000	780,000
<i>Subtotal</i>	12.00	1,089,933	1,527,638
<i>Subtotal Departments</i>		<b>5,591,423</b>	<b>6,029,128</b>

**CITY-WIDE EXPENSES**

• Customer Service Vision and Standards	4,000,000	4,000,000
• Measure E - Homelessness Coordination Team	1,852,470	1,852,470
• Climate and Seismic Resilience Planning	463,000	463,000
• Community-Based Violence Solutions	400,000	400,000
• Outcomes, Equity Indicators, and Performance Management	70,000	70,000
• Rebudgets	22,775,537	22,775,537

**GENERAL FUND CAPITAL, TRANSFERS AND RESERVES**

• Earmarked Reserves: Deferred Infrastructure and Maintenance Reserve	(2,000,000)	(2,000,000)
• Earmarked Reserves: City Attorney's Office Outside Litigation Reserve	(60,000)	(60,000)
• Earmarked Reserves: Rebudgets	138,700,000	138,700,000
<i>Subtotal Other Changes</i>	0.00	166,201,007

<b>Total Adopted Budget Changes</b>	<b>17.00</b>	<b>171,792,430</b>	<b>172,230,135</b>
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# STRATEGIC SUPPORT

## OFFICE OF THE CITY ATTORNEY



### MISSION

*The Office of the City Attorney is committed to providing excellent legal services, consistent with the highest professional and ethical standards, with the goal of protecting and advancing the City's interests in serving the people of San José.*

#### Primary Partners

Mayor and City Council  
**Office of the City Attorney**  
Office of the City Auditor  
Office of the City Clerk  
Office of the City Manager  
Office of the Independent Police Auditor

#### CSA OUTCOMES

- City Business is Conducted Lawfully
- City's Interests are Protected and Advanced

# STRATEGIC SUPPORT

## OFFICE OF THE CITY ATTORNEY

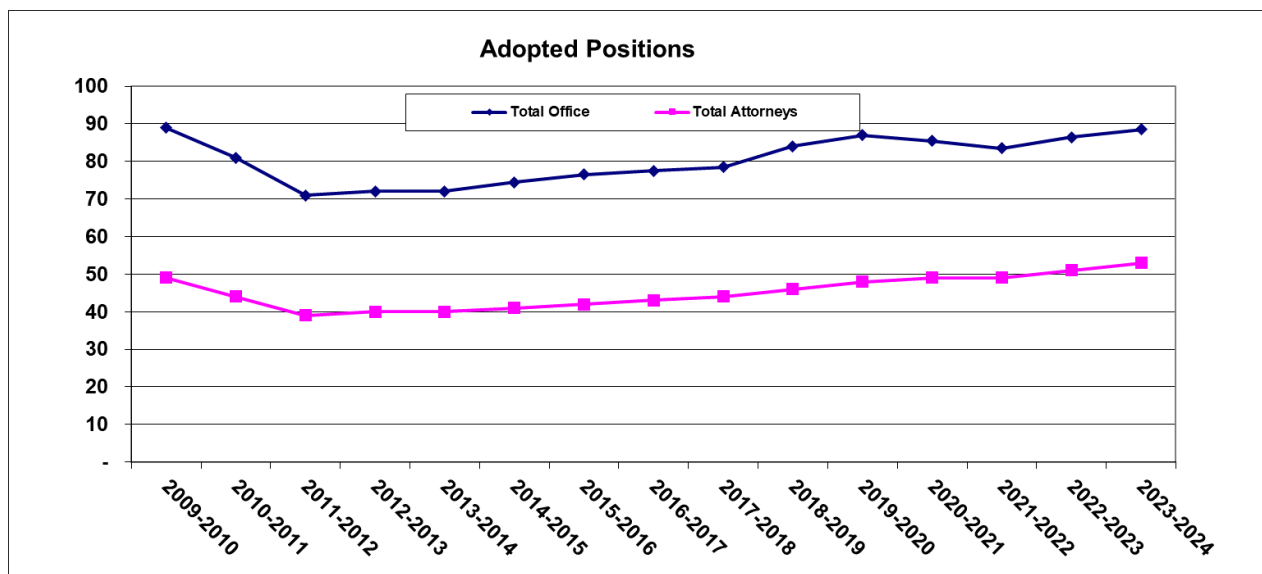
### OVERVIEW

#### Service Delivery Accomplishments

- The Office of the City Attorney effectively and economically represents and defends the City and its employees in all types of lawsuits, administrative hearings, arbitrations, appeals and criminal prosecutions. The Office also represents the City in Workers' Compensation matters.
- Attorneys work on a daily basis with City departments to review contracts, negotiate deals, provide legal advice, and generally inform the work of City staff with respect to legal issues and risks. Over the past two years, the Office worked with City staff to address a myriad of issues and impacts, including pandemic-related issues such as 1) the eviction moratorium and residential rent freeze ordinances, 2) agreements related to housing the unsheltered, 3) agreements related to food distribution, 4) advising on FEMA, CARES Act, and American Rescue Plan funding, and 5) advising on the implementation of the County and State Orders. Ongoing projects include affordable housing developments; CEQA and other planning issues and project review; the scaling of clean energy projects and energy procurement; public works projects, including the regional wastewater facility expansion; addressing homeless issues; debt financing and revenue issues; ethics and related issues; and advising and staffing certain Council committees and commissions.
- The Office continues to work with the Police Department and Code Enforcement to close unlawful and illegal businesses and to address blighted properties, recently including the use of receiverships.

#### Service Delivery Environment

- A substantial amount of the non-personal/equipment budget is earmarked for experts and consultants that assist the Office in complex litigation and transactional matters.
- Staffing has remained almost static over the last fourteen years and remains lower than 2009-2010 levels. The Office had 86.5 positions in 2022-2023 compared to 89 positions in 2009-2010. The Office's 2023-2024 Adopted Budget has 88.50 positions.





# STRATEGIC SUPPORT

## OFFICE OF THE CITY ATTORNEY

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 1: CITY BUSINESS IS CONDUCTED LAWFULLY**

- ✓ Provide legal counsel at all City Council and Council Committee meetings and certain meetings of major boards and commissions, as necessary. The Office continues to provide staffing at all Planning Commission, Civil Service Commission, and Appeals Hearing Board Commission meetings. In addition, the Office provides legal counsel to all other Boards and Commissions.
- ✓ Prepare and review ordinances, resolutions, permits, contracts, and other legal documents.
- ✓ Perform analyses on relevant federal and state legislative actions.
- ✓ Provide oral and written legal advice and opinions.
- ✓ Provide legal services to assist City staff in identifying additional revenue sources, including analysis and implementation of revenue sources (e.g., taxes, assessments, and fees).
- ✓ Continue to provide significant construction related legal services for the various Public Works capital projects as well as implementation of the Water Pollution Control Capital Program and the Sanitary Sewer System Capital Program.
- ✓ Respond, review, and coordinate complex Public Records Act requests. Considerable resources are dedicated to increasingly complex Public Records Act requests involving electronic data.

#### **OUTCOME 2: CITY'S INTERESTS ARE PROTECTED AND ADVANCED**

- ✓ Initiate and defend lawsuits and other legal actions involving the City.
- ✓ Initiate collection actions on behalf of the City for matters where the debt is over \$5,000.
- ✓ Provide legal representation at administrative hearings.
- ✓ Prosecute select municipal code violations to address serious health and safety concerns.
- ✓ Investigate and respond to claims filed against the City.
- ✓ Conduct and coordinate confidential internal City investigations.
- ✓ Devote considerable resources to respond to increasingly complex discovery and Public Records Act requests involving electronic data.

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# STRATEGIC SUPPORT

## OFFICE OF THE CITY AUDITOR



### MISSION

*To independently assess and report on City operations and services*

#### Primary Partners

Mayor and City Council  
Office of the City Attorney  
**Office of the City Auditor**  
Office of the City Clerk  
Office of the City Manager  
Office of the Independent Police Auditor  
Office of Retirement Services

#### CSA OUTCOMES

- ❑ Identify Ways to Increase the Economy, Efficiency, Effectiveness, Equity, and Accountability of City Government
- ❑ Provide Independent, Reliable, Accurate, and Timely Information to the City Council and Other Stakeholders

# STRATEGIC SUPPORT

## OFFICE OF THE CITY AUDITOR

### OVERVIEW

#### Service Delivery Accomplishments

- The Office of the City Auditor completed 15 audit projects or approximately 1.4 audits per auditor (Target: 1.5 audits per auditor).
- During 2022-2023, the Office identified \$15,492,500 in potential savings or revenue enhancements, achieving a ratio of about \$5.58 in monetary benefits to every \$1 in audit costs (Target: \$2 to \$1).
- The Office provided oversight of external financial auditors regarding the City of San José Annual Financial Audit, Single Audit, and related financial audits; the audits of bond programs such as the Parks and Recreation Bond Projects, Branch Libraries Bond Projects, Neighborhood Security Bond, and Public Safety and Infrastructure Bond, and Library Parcel Tax funds; the Annual Compliance Review of San Jose Clean Energy's Risk Management Practices, and the Semi-Annual Reviews for compliance with the City's Investment Policy.
- The Office followed up on 217 open audit recommendations. Over the past ten years, departments have implemented or closed about 78% of all audit recommendations that improve service delivery to residents, identify operational efficiencies or cost savings, increase transparency and accountability, or improve security over City assets (Target: 80%). About 55% of recommendations made in the past five years have been implemented.

#### Service Delivery Environment

- The City Charter provides that the Office of the City Auditor conduct performance audits to determine whether City resources are being used in an economical, effective, efficient, equitable manner; established objectives are being met; and desired results are being achieved.
- As the City continues to look for efficiencies in service delivery, the Office will continue its focus on identifying revenues and cost-savings opportunities, and will work with the City Manager's Office to target areas for audit that are likely to yield the most benefit and address areas identified in the City Auditor's Citywide risk assessment model.
- The Office will also continue to improve the availability and usage of audited performance data and focus audit recommendations on improving City services through better use of technology and data.

# STRATEGIC SUPPORT

## OFFICE OF THE CITY AUDITOR

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 1: IDENTIFY WAYS TO INCREASE THE ECONOMY, EFFICIENCY, EFFECTIVENESS, AND ACCOUNTABILITY OF CITY GOVERNMENT**

- ✓ Conduct performance audits, special audits, and reviews that identify ways to increase the economy, efficiency, effectiveness, and equity of City government. The Office's 2023-2024 Audit Workplan will target City Council and other City Appointee concerns and areas identified in the City Auditor's City-Wide risk assessment model.
- ✓ Conduct recommendation follow-up. The Office prepares a status report of all open audit recommendations as of June 30 and December 31 each year. Through December 2022 approximately 78% of the 775 recommendations made over the last 10 years have been implemented.
- ✓ The Office will continue to work to improve the availability and usage of audited performance data and focus audit recommendations on improving City services through better use of technology and data.

#### **OUTCOME 2: PROVIDE INDEPENDENT, RELIABLE, ACCURATE, AND TIMELY INFORMATION TO THE CITY COUNCIL AND OTHER STAKEHOLDERS**

- ✓ Prepare audit reports and memoranda that provide independent, reliable, accurate, and timely information to the City Council. The 2022-2023 Audit Workplan was approved by the City Council in August 2022. The 2023-2024 Audit Workplan was approved by City Council in August 2023.
- ✓ Provide performance reporting and enhance the display of online performance information. In December 2022, the Office published the City's fifteenth *Annual Report on City Services*. The Office will continue this project in 2023-2024 and will continue to work with City staff on audit projects designed to improve the City's performance management and reporting systems.
- ✓ Continue to improve the City Auditor website. The Office's website includes copies of audit reports issued by the Office since 1985 and links to the City Council Committee archive video of the hearings where available. The Office will continue to ensure that information on the site is current and relevant, and work toward translating audit results into multiple languages.

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## STRATEGIC SUPPORT

### OFFICE OF THE CITY CLERK



### MISSION

*Provide strategic support services and leadership to maximize public access to municipal government*

#### Primary Partners

Mayor and City Council  
Office of the City Attorney  
Office of the City Auditor  
**Office of the City Clerk**  
Office of the City Manager  
Office of the Independent Police Auditor  
Office of Retirement Services

#### CSA OUTCOMES

- The Municipal Legislative Process is Accessible and Open to the Community

# STRATEGIC SUPPORT

## OFFICE OF THE CITY CLERK

### OVERVIEW

#### Service Delivery Accomplishments

The Office of the City Clerk continued to ensure that mandated services were provided in the most cost-effective manner. In 2022-2023, the Office:

- Conducted an election for City Councilmembers and ballot measures; provided research and oversight of the unanticipated vacancy recruitment and appointment for Council Districts 8 and 10; and maintained compliance with open government, campaign finance, lobbyist registration, statements of economic interest, and other public disclosure requirements.
- Prepared and distributed agenda packets, synopses, and action minutes of City Council, Rules and Open Government committee meetings, and posted them on the City's website. Prepared and distributed minutes for other City Council committees, and other entities, such as the Financing Authority, and staffed approximately 200 meetings. All City Council and City Council committee meetings were web-casted live, indexed, and archived for on-demand replay.
- Provided access to the City's legislative records and documents; reviewed and executed approximately 2,748 City contracts for administrative compliance, and made them available for review. Fulfilled requests for the City's legislative records and related public documents under provisions of the California Public Records Act. Updated and posted the Municipal Code, City Charter, and Council Policy Manual on the City's website. Indexed all documents presented to the City Council for storage and retrieval, and made available to the public.
- Provided fiscal, grant, budget, human resources, payroll, administrative, and technical support services for the Office of the Mayor, City Council Offices, and for the City's Boards, Commissions, and Committees, including approximately 294 grants, 41 recruitments and onboarding and over 100 candidates for fingerprinting for Mayor and City Council Offices, and 92 appointments and approximately 262 applications for Boards and Commissions.
- Processed 151 Public Records Act (PRA) requests resulting in 1,574 documents produced.

#### Service Delivery Environment

The Office of the City Clerk continues to see heavy workload in all areas of Office operations. As the Office plans for the next five years, the overarching goal remains to enhance the use of technology to improve and expedite services. Specific examples of trends, issues, and opportunities include:

- Continued work on new Open Government policies and procedures in line with the "Open Data Policy" and recommendations from the Sunshine Reform Task Force, including disclosure requirements (calendars, outside income, and fundraising) for the Mayor and City Councilmembers.
- The need for an improved, less labor-intensive process for creating and disseminating City Council meeting agendas and memoranda, and improved technology to enhance the public's access to the City's legislative process and records, including exploring technology options to provide consistent and reliable interpretation services for City Council and Council Committee meetings.
- The increased demand for access to a wide variety of public records, including a rising community expectation for online access to candidate and committee campaign disclosure statements and lobbyist activity reports.



# STRATEGIC SUPPORT

## OFFICE OF THE CITY CLERK

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME: THE MUNICIPAL LEGISLATIVE PROCESS IS ACCESSIBLE AND OPEN TO THE COMMUNITY**

The Office of the City Clerk has three strategic goals and objectives:

- ✓ Deploy technology resources effectively;
- ✓ Increase efficiency of service delivery; and
- ✓ Maintain high levels of customer service.

The Office of the City Clerk will provide the following services directly related to this outcome:

- ✓ Successfully conducting municipal elections for the City Council members and ballot measures;
- ✓ Creating and distributing agenda packets, synopses, and minutes for all City Council meetings and City Council Rules and Open Government Committee meetings; additionally, provide legislative services to all other Council Committees by writing and distributing minutes pertaining to Ordinances, Resolutions, and Charter Amendments;
- ✓ Continuing to conduct in-person, hybrid, or virtual Council Meetings and City Board, Commissions, and Committee meetings as needed in coordination with the Office of the City Manager, and ensure the availability of Spanish and Vietnamese interpretation services for City Council meetings, study sessions, and committee meetings;
- ✓ Posting all changes to the San José Municipal Code and the City Council Policy Manual on the web; publishing and distributing hard-copy supplements;
- ✓ Creating and maintaining a legislative history of City Council, Successor Agency to the Redevelopment Agency, the Oversight Board, and related entities' actions; and indexing and filing all public records such that the records can be retrieved in a timely manner and the history is readily available;
- ✓ Conducting the recruitment, application, and selection processes for boards and commissions through the Council Appointment Advisory Commission; directing City Council interview and appointment; and facilitating the City Council's appointment of public members to the Retirement Boards and the Civil Service Commission;
- ✓ Conducting employee and retiree elections for the employee and retiree members, as applicable, of both Retirement Boards and the Civil Service Commission;
- ✓ Providing administrative support services to the Board of Fair Campaign and Political Practices, Civil Service Commission, Council Salary Setting Commission, and Council Appointment Advisory Commission;
- ✓ Researching City Council actions and records from the adoption of the City Charter to the present;
- ✓ Providing administrative support including fiscal management, human resources administration, budgeting, grant administration, and procurements for the Mayor and City Council Offices; and
- ✓ Accepting and making available all Statements of Economic Interests, campaign finance disclosure forms, lobbyist registration and reporting forms, and all disclosures required of the Mayor and City Council members (calendars, fundraising solicitations, and outside income disclosure).

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# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER



### MISSION

*Provide strategic leadership that supports the Mayor and the City Council and motivates and challenges the organization to deliver high quality services that meet the community's needs*

### **Primary Partners**

Mayor and City Council  
Office of the City Attorney  
Office of the City Auditor  
Office of the City Clerk  
**Office of the City Manager**  
Office of the Independent Police Auditor

### **CSA OUTCOMES**

- The Community Receives Customer-Focused, Results-Driven Services
- The Mayor and Council are Effectively Supported in Making Public Policy Decisions
- Support Employees to Actively Engage With and Achieve the City's Mission

# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Service Delivery Accomplishments

- ❑ **Executive Leadership and City Management** provided strategic leadership to support the Mayor and City Council in their policy making and implementing their priorities, including a coordinated Mayor and City Council transition with comprehensive briefings of City governance, City operations, and major projects and plans in partnership with other Appointees; ensured effective and efficient Core Service and Capital Project delivery to the City's diverse community with a total budget of \$6.0 billion; led and engaged the workforce that included almost 6,900 full-time equivalent positions; advanced the City Council Initiatives Roadmap of 41 priority initiatives, including the City Manager's eight Enterprise Priority work plans; advanced the City's *One Team* Leadership Values and Expectations vision for the Senior Staff and all City employees; provided leadership through both the COVID-19 pandemic recovery and the 2022–2023 Winter Storm responses by ensuring the continuation of essential City services, providing vulnerable residents with services, and keeping City employees safe and supported; and led organizational focus and dedication around the City Manager Key Foundational Initiatives, including 1) Delivering Excellent Customer Service through the multi-year effort of implementing the City Council approved Customer Service Vision and Standards; 2) Closing Racial Inequities; 3) Structurally Balancing the General Fund Budget and Driving Organizational Performance; 4) Advancing the Police Reforms Work Plan; and 5) Making San José a Great Place to Work through the City's recruitment, hiring, and retention efforts. Also focused on resource and operational improvements for Animal Care and Services; Developmental Services to improve performance levels; a Downtown Strategy to make Downtown more welcoming, vibrant, and safe; equitable and effective deployment of park maintenance resources to improve park conditions; and Police and Fire Sworn Staffing to improve the number and diversity of recruits for sworn public safety services. In addition, oversaw the COVID-19 Recovery Task Force with 55 member organizations pursuant to City Council direction, leading to acceptance of the Task Force Report and recommendations by City Council; continued the City's Customer Service Vision and Standards initiative and advanced progress on the Child and Youth Master Plan; and worked to reimagine the Vehicle Abatement Program.
- ❑ **Office of Administration, Policy, and Intergovernmental Relations** processed approximately 1,560 contracts; reviewed nearly 650 City Council Agenda reports; assigned and tracked over 65 Council Referrals; successfully advocated for \$3.5 million in direct funding to the City of San José from federal delegation member requests and \$3.5 million in direct funding to the City of San José from state delegation member requests; reviewed over 2,400 legislative items and sponsored or took a position on nearly 70 bills; coordinated responses to over 235 multi-department Public Records Act requests; began implementing the City's Disability Accessibility workplan and Gun Harm Reduction Ordinance; led a Study Session on Gun Violence Prevention; supported City Council Committees and several working groups; and created a new Form 700 policy.

# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Service Delivery Accomplishments

- ❑ **Budget Office** provided ongoing review, monitoring, analyses, forecasts, and reporting on the City's over 140 Operating and Capital funds totaling \$6.0 billion with almost 6,900 positions, allowing for effective oversight and controls throughout the fiscal year, including bi-monthly financial reports to the Public Safety, Finance and Strategic Support Committee, and budgetary adjustments included within the 2021-2022 Annual Report, the 2022-2023 Mid-Year Budget Review, and the 2022-2023 Year-End Budget Adjustments memorandum; oversaw and coordinated the development of the 2023-2024 Operating Budget, 2023-2024 Capital Budget and 2024-2028 Capital Improvement Program, 2023-2024 Fees and Charges Report, and the issuance of various cost estimates and Manager's Budget Addenda requested by the Mayor and City Council; assigned and tracked over 200 Council Budget Referrals; collaborated with the Office of Racial Equity and departmental staff to further embed the explicit consideration of equity into the budgeting process, including a new iteration of the Budgeting for Equity Worksheet; coordinated with departments on the review of hundreds of City Council memoranda; and supported the modernization of City Service Area and departmental Core Service performance measures, Activity and Workload Highlights, and community indicators by piloting the performance management model with the Neighborhood Services City Service Area and associated departmental Core Services.
- ❑ **Communications Office** released 13 Flash Reports supporting Winter Storm Emergency Operation Center activations in January and February 2023; received over 78,000 visits to Emergency Notification Pages including Vietnamese, Traditional Chinese, and Spanish translated pages; garnered over 6 million social media impressions on multiple platforms for COVID-19 communications with over 1,000 multilingual social media graphics created; provided nearly 600 translations and reviews with the Language Access Unit; sent over 195,000 [City Manager's 30-Day Roundup](#) emails; garnered over 3.3 million impressions on City's social media platforms and 5.2 million visitors to the [City website](#) in 2022; led complex, multilingual campaigns in collaboration with City Departments, including for the [Gun Harm Reduction Ordinance](#) and the Finance Department's [Disparity Study](#); deployed a SJ311 marketing campaign to underrepresented communities in Vietnamese, Spanish, and English; and Launched CityLINE, a quarterly internal newsletter.
- ❑ **Office of Emergency Management** maintained coordination with Santa Clara County on response operations including vaccinations, logistics, public information, and alerts until the federal emergency terminated in May 2023; completed the COVID-19 After Action Report; developed a draft Continuity of Operations Plan for each of the City departments; activated the Emergency Operations Center to respond to two winter storm and flood warning events; retooled instructional delivery to conduct eight virtual and two in person Community Emergency Response Team courses including in Spanish, Vietnamese, and Chinese, resulting in 175 graduates, including 107 graduates from underserved communities; completed review and updated the Emergency Operations Plan and five annexes; and collaborated with the Fire Department and Public Works Department to complete the new Emergency Operations Center and Fire Training Center.

# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Service Delivery Accomplishments

- ❑ **Office of Employee Relations** engaged in negotiations with seven bargaining units representing approximately 4,500 active employees (approximately 3,700 Full Time Equivalent) whose current Memoranda of Agreement expired on June 30, 2023; conducted approximately 100 trainings; conducted approximately 55 personnel investigations; created and/or revised 15 City policies; and engaged in the meet and confer process with bargaining units over various labor issues outside of contract negotiations.
- ❑ **Office of Racial Equity** developed a Racial Equity Impact Analysis Guide; implemented the Budgeting for Equity Worksheet and had 100% compliance by City departments, implemented 7 trainings, with 235 City employees; ensured all new employees receive racial equity foundational training within 30 days of hire; monitored and consulted on 18 department-specific Racial Equity Action Plans; planned for and hosted the Welcoming Interactive conference for over 500 attendees; initiated recruitment for the *San Jose for All Advisory Group* which received 130 applications; implemented 10 strategies to combat anti-Asian hate; provided monthly Office of Racial Equity briefs for City Council; and supported 8 multicultural events and a Citizenship Workshop attracting over 500 aspiring US Citizens.

#### Service Delivery Environment

The Office of the City Manager's Service Delivery environment is focused on delivering City Service Area and Departmental and Program Core Services efficiently and effectively while making measurable progress on four City Council approved Focus Areas: Increasing Community Safety; Reducing Unsheltered Homelessness; Cleaning Up Our Neighborhoods; and Attracting Investment in Jobs and Housing; in addition advancing the City Manager's Foundational Strategic Support Initiatives, which include Delivering Excellent Customer Service Vision and Standards Initiative, Closing Racial Inequities, Driving Organizational Performance, Structurally Balancing our General Fund Budget, and Making San José a Great Place to Work.

#### Budget Dollars at Work: Performance Goals

Performance goals for department City Service Areas (CSA) and Core Services are described throughout this document. This section describes what is needed from a leadership perspective to guide and achieve those goals and is organized around key efforts and objectives of the Office of the City Manager based on three outcomes.

# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 1: THE COMMUNITY RECEIVES CUSTOMER-FOCUSED, RESULTS-DRIVEN SERVICES**

- ✓ Focus on providing leadership necessary for organizational initiatives that continue to position the City as a more focused, efficient, and sustainable organization for the future.
- ✓ Focus on recruiting, hiring, and retaining City employees so that service-delivery is maximized to the community.
- ✓ Pursue public-private partnerships both directly with community and corporate partners, as well as convene City departments and offices to develop more effective workforce support and development practices.
- ✓ Provide organizational and customer service improvement efforts through implementation of the Customer Service Vision and Standards Initiative to improve how we do business, streamline processes, increase employee empowerment, and achieve results in an environment of constant change, increasing complexity, and constrained financial resources.
- ✓ Implement police reforms and work closely with the community, community-based agencies, faith-based organizations, social justice advocates, law enforcement agencies, County, State, and federal agencies, and youth on public safety issues.
- ✓ Pursue grants and partnerships as a top priority given the significantly limited City funding available for infrastructure and new initiatives, and unprecedented new availability of federal infrastructure funding.
- ✓ Work with regional governance partners on Bay Area inter-agency issues.
- ✓ Provide organizational strategic support that advances disability inclusion equity.
- ✓ Implement a culturally sensitive communication plan for community outreach, ensuring the City's diverse population has access to City services and critical information in their native language.
- ✓ Provide safe service delivery as the City recovers from the COVID-19 pandemic and extreme weather events to ensure community and economic recovery efforts are equitable and comprehensive.
- ✓ Implement a city-wide equity framework that will examine and improve the City's internal policies, practices, and systems to eradicate structural and/or institutional racism that may exist in our City government and ultimately improve outcomes for People of Color, including Black, Indigenous, Latino/a/x, Asian, and Pacific Islander communities.

# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 2: THE MAYOR AND CITY COUNCIL ARE EFFECTIVELY SUPPORTED IN MAKING PUBLIC POLICY DECISIONS**

- ✓ Coordinate City agenda items for City Council consideration, including preparation and development of City Council meeting scheduling.
- ✓ Provide staff expertise, written memorandums, reports, and general staffing support for City Council Committees, Commissions, and working groups.
- ✓ Disseminate City Information Memoranda that support the ability to monitor the organization's work as well as track and monitor City Council referrals for appropriate departmental follow-up.
- ✓ Strengthen the City-County partnership by meeting regularly with the County Executive, supporting meetings between key City and County elected officials and staff, and focusing attention on issues of shared services between the organizations.
- ✓ Promote intergovernmental relations with strong advocacy for the City's financial, policy, and community needs at the regional, state, and federal levels.
- ✓ Modernize and update the City Service Areas outcomes, community indicators, and performance measures.
- ✓ Provide City Council, Department, and public access to performance management and evaluation tools for policy-making and priority-setting within the budget process and service delivery to ensure accountability and transparency.
- ✓ Provide support to the City Council in implementing fiscal sustainability and other potential ballot measures or initiatives.
- ✓ Monitor the fiscal and economic environment and adjust the 2023-2024 Adopted Budget, as appropriate, to ensure adequate resources to meet approved expenditure levels.
- ✓ Bring forward balanced budgets for the General Fund and all other City funds for 2024-2025 that reflect City Council and community goals, have an applied equity lens, and help ensure fiscal stability for the \$6.1 billion 2023-2024 budget with over 140 Operating and Capital funds, impacting approximately 7,039 positions.



# STRATEGIC SUPPORT

## OFFICE OF THE CITY MANAGER

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 3: SUPPORT EMPLOYEES TO ACTIVELY ENGAGE WITH, AND ACHIEVE, THE CITY'S MISSION**

- ✓ Provide strategic leadership for the organization, support the City Council, and motivate the workforce to deliver high quality services in an environment of increasing demands and limited resources.
- ✓ Continue to strategically target efforts that challenge the organization to develop innovative ways to deliver services and streamline operations to be more efficient, including the digital delivery of City services and operations.
- ✓ Engage the workforce through ongoing, structured communication and ongoing implementation of an overarching workforce support and development strategy to effectively engage, recruit, and retain top talent.
- ✓ Work with employees to develop the organization's capacity in civic engagement and make a difference in the civic life of our community.
- ✓ Invest in employees by aligning their development needs with the current and future needs of the City.
- ✓ Ensure employees have access to training and the resources needed to feel safe and supported in the workplace, including providing and promoting programs that foster employee health and wellness.
- ✓ Foster constructive and professional working relationships with the City's employee labor unions.
- ✓ Champion the City's Mentorship program as an opportunity for City leadership to support employee growth and development in their career with the City.

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# STRATEGIC SUPPORT

## OFFICE OF RETIREMENT SERVICES



### MISSION

*Provide quality services in the delivery of pension and related benefits and maintain financially sound pension plans*

#### Primary Partners

Mayor and City Council  
Office of the City Attorney  
Office of the City Auditor  
Office of the City Clerk  
Office of the City Manager  
Office of the Independent Police Auditor  
**Office of Retirement Services**

#### CSA OUTCOMES

- Retirement plans are properly administered.
- Investment of assets to satisfy Retirement Plans' obligations.

# STRATEGIC SUPPORT

## OFFICE OF RETIREMENT SERVICES

### OVERVIEW

#### Service Delivery Accomplishments

- Established Trustee Federated Disability Committee.
- Established Police and Fire Ad Hoc Committee on San José Municipal Code § 3.36.3660.
- Continued publication of the Office of Retirement Services (ORS) quarterly newsletter - *The Retirement Connection*.
- Hosted in-person Open Enrollment Health Fair for Retirees.
- Implemented Virtual Health Fair for Open Enrollment.
- Updated and continued to use the Open Enrollment website to augment Virtual Health Fair activities.
- Continued implementation of the Boards' strategic communications plan.
- Continued implementation of technology to support remote workforce.
- Maintained the Office of Retirement Services website to ensure accurate and up to date information is communicated.
- Continued implementation of AB361 for the Boards to conduct meetings virtually.
- Conducted operational internal audits in the Benefits and Accounting divisions as part of the Five-Year Internal Audit Plan.
- Onboarded new Board trustees for both the Police and Fire and Federated plans.
- Continued working on the enforcement of the Medicare Mandate.
- Completed Request for Proposals (RFP) for an Independent Financial Auditor.
- Continued to evaluate investment opportunities and the Plans' Strategic Asset Allocation mixes considering the effects of both the COVID-19 pandemic as well as geopolitical risks.
- Continue implementation of Internal Audit Charter.

#### Service Delivery Environment

- Work with the communications consultant to further develop strategic communication activities for future years.
- Establish policies and procedures regarding Felony Forfeiture.
- Continue implementing workplan identified in 5-year audit plan by the ORS internal auditor.
- Publish revised Tier 1 and Tier 2 Member Handbooks.
- Complete phone upgrade project for the office.
- Identify return-driven investment opportunities, balancing risk, amid the global economic environment.

# STRATEGIC SUPPORT

## OFFICE OF RETIREMENT SERVICES

### OVERVIEW

#### Budget Dollars at Work: Performance Goals

#### **OUTCOME 1: RETIREMENT PLANS ARE PROPERLY ADMINISTERED**

- Work with the Retirement Plans' actuaries to ensure the plans have adopted and implemented rates, assumptions, and methodologies reflective of the plans' liabilities and with appropriate contribution volatility.
- Conduct and manage approximately 100 board meetings annually to provide the information necessary to assist the board members in fulfilling their fiduciary duties.
- Provide quality customer service by working with members to ensure excellent retirement planning and counseling through educational classes and meetings via an average of a thousand phone inquiries and seventy walk-in visits per month.
- Publish annual financial reports, which include the ACFR and the PAFR, to maintain accountability and provide fiscal transparency.

#### **OUTCOME 2: INVESTMENT OF ASSETS TO SATISFY PLANS' OBLIGATIONS**

- Manage Retirement Plan assets in a manner that seeks to achieve long-term net returns in more than the actuarial investment return assumption and adopted benchmarks, while maintaining a reasonable level of investment risk.
- Work with investment consultants to review and adopt asset allocations reflective of the Retirement Boards' risk tolerances, developing enhanced framework for determining the appropriate level of risk.
- Monitor and evaluate performance and attribution of Retirement Plan assets to determine areas for potential improvement and focus.
- Perform in-depth analysis on investment managers, ensuring that investment managers are performing within acceptable parameters and delivering anticipated value-add. Source and perform due diligence on prospective investment managers and retain when appropriate.
- Develop, implement, and ensure compliance with Retirement Board-adopted investment policies.

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