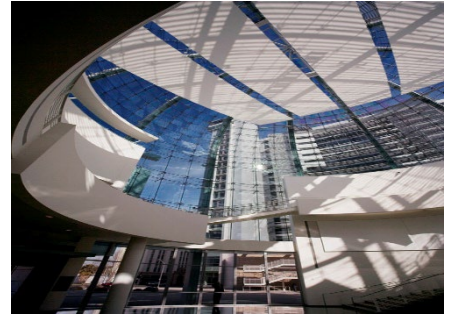


CITY SERVICE AREA

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

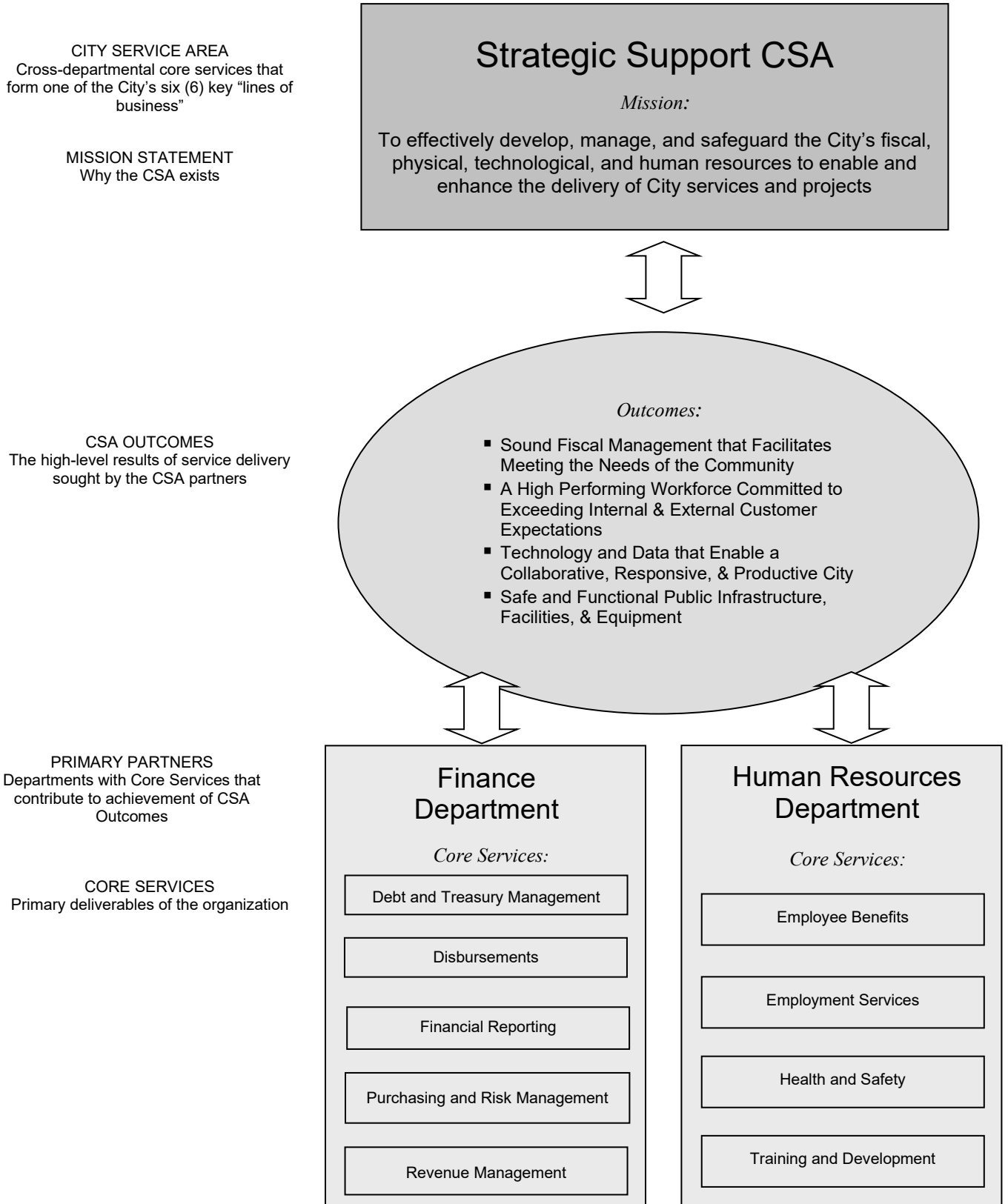
CSA OUTCOMES

- ❑ 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

STRATEGIC SUPPORT

SERVICE DELIVERY FRAMEWORK

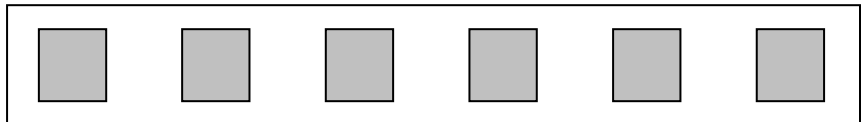
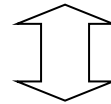
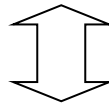
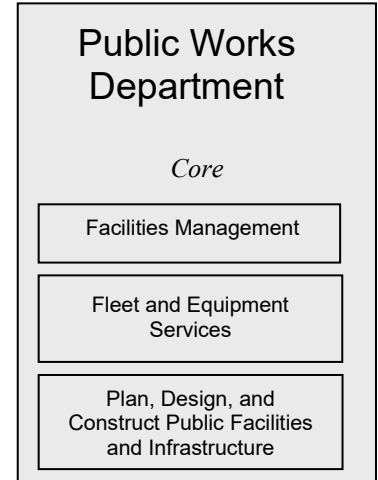
PRIMARY PARTNERS
Departments with Core Services that contribute to achievement of CSA Outcomes

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

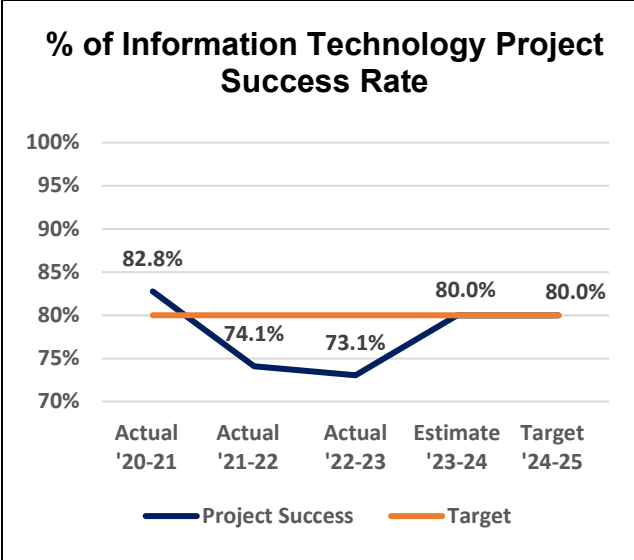
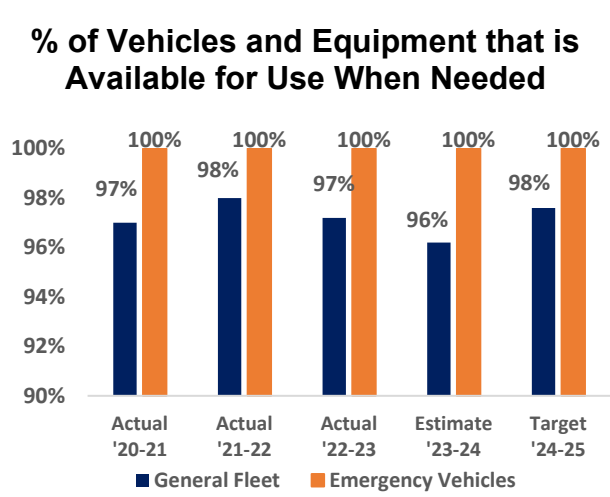
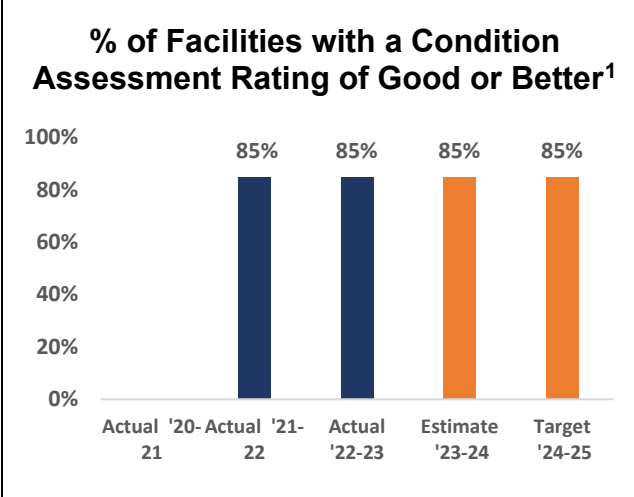
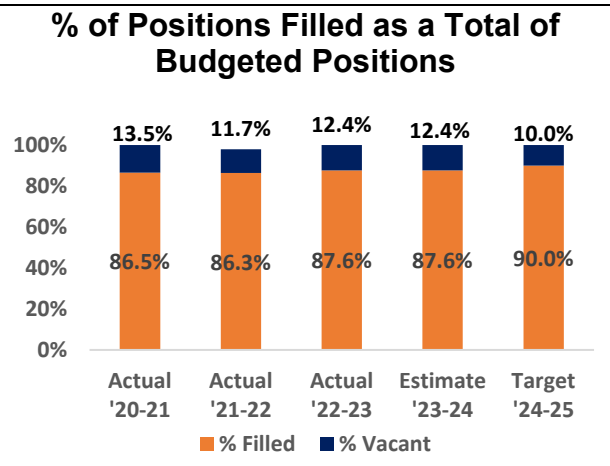
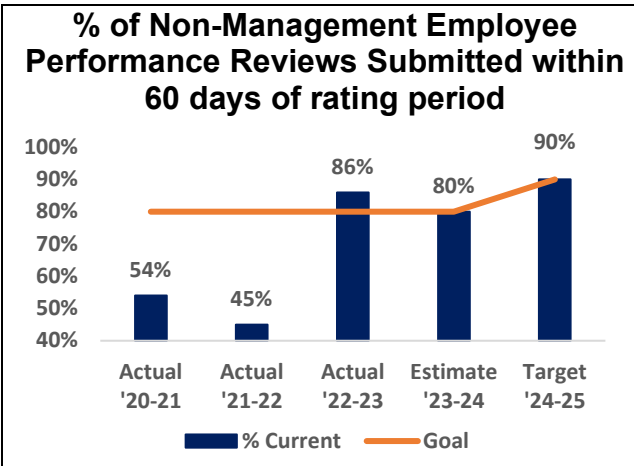
STRATEGIC SUPPORT
Organization-wide guidance and support to enable direct service delivery



CITY SERVICE AREA

STRATEGIC SUPPORT

PERFORMANCE MEASURE DASHBOARD



City's Bond Ratings (General Obligation Bond Rating)

	Moody's	Standard & Poor's	Fitch
Actual '19-20	Aa1	AA+	AA+
Actual '20-21	Aa1	AA+	AAA
Actual '21-22	Aa1	AA+	AAA
Actual '22-23	Aa1	AA+	AAA
Actual '23-24	Aa1	AA+	AAA
Target '24-25	Aa1	AA+	AAA

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

CITY SERVICE AREA

STRATEGIC SUPPORT

BUDGET SUMMARY

CSA Priorities/Expected 2024-2025 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; procure and deliver top-notch products and services; and deploy efficient business systems and processes for timely billing and collection efforts.
- Hiring for Talent: Continue to reduce vacancies by evaluating, streamlining, and innovating for effective hiring practices and building long-term capacity through strategic pipeline programs.
- 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 City priorities and equity solutions using technology and data to transform City services. Execute initiatives with City departments that identify and resolve service needs that lift San José's people. Provide the data and analytics resources for City departments to drive towards decision-making informed by data. Enable teams that train and practice service design skills that improve the accessibility, responsiveness, and positive outcomes for City residents and businesses.

2024-2025 Key Budget Actions

- Makes permanent 1.0 Analyst position and extends 1.0 Analyst and 1.0 Accounting Technician positions through June 30, 2025 in the Finance Disaster Recovery and Grants Management group.
- Makes permanent 1.0 Analyst position and eliminates 1.0 vacant Senior Account Clerk position in the Finance Administration group to provide additional capacity for public records management and other internal administrative support.
- Eliminates 1.0 vacant Program Manager position, extends 3.0 Analyst I/II positions and adds 1.0 Senior Analyst position, through June 30, 2025, in the Human Resources Employment Division to advance recruitment efforts previously initiated under the Recruitment Centralization Pilot Program.
- Continues and makes permanent 1.0 Senior Analyst position, continues 1.0 Senior Analyst through June 30, 2025, and adds \$250,000 to support the San José 311 Program.
- Adds 1.0 Enterprise Supervising Technology Analyst position to provide additional capacity in the Information Technology Cybersecurity Team under the Chief Information Security Officer to evaluate and respond to cybersecurity threats.
- Makes permanent 1.0 Senior Systems Applications Programmer (SSAP) position and extends 1.0 System Application Programmer position in Public Works Technology Services Division's Capital Project Management System (CPMS) team to support CPMS development.
- Adds 1.0 Equipment Maintenance Supervisor position to provide strategic support to the Fleet Manager focusing on fleet sustainability and energy resiliency and resource the division to continue to maintain current service levels to the growing fleet of vehicles.

CITY SERVICE AREA

STRATEGIC SUPPORT

BUDGET SUMMARY

City Service Area Budget Summary**

	2022-2023 Actuals **	2023-2024 Adopted	2024-2025 Forecast	2024-2025 Adopted
Dollars by Core Service *				
<i>Finance Department</i>				
Debt and Treasury Management	12,553,665	6,044,562	6,241,980	6,607,828
Disbursements	2,996,373	3,420,545	3,308,624	3,382,939
Financial Reporting	3,487,700	4,487,586	3,657,257	4,467,257
Purchasing and Risk Management	5,942,440	7,555,781	8,091,271	8,125,771
Revenue Management	8,874,659	12,555,250	9,022,742	13,195,329
Strategic Support - Other - Strategic Support	313,712,927	50,922,448	51,640,702	51,648,575
Strategic Support - Strategic Support	3,356,031	3,454,456	2,609,264	3,212,070
<i>Human Resources Department</i>				
Employee Benefits	98,445,588	108,633,830	121,081,930	121,803,930
Employment Services	4,106,078	4,874,239	4,630,608	5,200,988
Health and Safety	6,841,565	6,847,355	7,626,689	7,626,689
Strategic Support - Other - Strategic Support	1,934,776	2,348,498	2,308,903	2,131,687
Strategic Support - Strategic Support	2,078,225	2,502,425	1,633,749	1,633,749
Training and Development	1,018,400	1,957,997	2,263,931	2,407,931
<i>Information Technology Department</i>				
Business Solutions	11,090,130	13,821,333	15,125,321	15,881,642
San José 311	2,904,638	3,373,658	2,808,164	3,541,494
Strategic Support - Other - Strategic Support	82,545	821,987	983,962	1,155,091
Strategic Support - Strategic Support	6,299,925	8,198,723	6,093,525	6,975,219
Technology Infrastructure and Operations	10,776,751	16,992,122	12,183,983	16,536,294
<i>Public Works Department</i>				
Facilities Management	36,638,800	37,239,632	47,145,123	37,341,158
Fleet and Equipment Services	31,719,002	43,865,142	39,466,773	49,866,690
Plan, Design, and Construct Public Facilities and Infrastructure	39,285,580	48,776,496	54,371,755	52,145,835
Strategic Support - Other - Strategic Support	23,025,947	60,637,545	38,080,541	63,495,870
Strategic Support - Strategic Support	25,602,710	13,057,455	13,437,453	14,022,526
Dollars by Core Service Subtotal	\$652,774,454	\$462,389,065	\$453,814,250	\$492,406,562
MAYOR, CITY COUNCIL, AND APPOINTEES	\$88,816,988	\$120,700,808	\$93,023,803	\$119,654,685
Total CSA	\$741,591,441	\$583,089,873	\$546,838,053	\$612,061,247
Authorized Positions	1,032.00	1,070.69	1,045.19	1,041.71

* 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 2022-2023 Actuals column reflect those included in the 2022-2023 Adopted Budget. 2022-2023 Actuals may not subtotal due to rounding.

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	2022-2023 Actuals	2023-2024 Target	2023-2024 Estimate	2024-2025 Target	5-Year Goal
Develop and encourage supervisors and managers that support a high-performing workforce	1. % of employee performance reviews submitted within 60 days of the end of the rating period ¹	86%	90%	80%	90%	95%
Attract, hire, and retain employees	1. Citywide Staffing Rate. % of positions filled as a total of budgeted positions	87.6%	90%	87.6%	90%	91%
Provide the necessary and required safety & health services that ensure employee health, safety and well-being	1. # of open Workers' Compensation claims	2,491	2,650	1,941	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:					
	- timeliness of City employees	61%	70%	N/A ²	70%	83%
	- courtesy of City employees	75%	75%	N/A ²	75%	83%
	- competency of City employees	61%	70%	N/A ²	70%	83%

¹ Reflects the revised common standard for the timely completion of performance appraisals, in accordance with Recommendation #4 of the City Auditor's February 2024 audit report, "Non-Management Performance Appraisals: The Administration Should Improve and Clarify Appraisal Processes."

² 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, 2023-2024 community survey data will be reported as part of the City Auditor's Annual Report on City Services for 2023-2024 and the 2023-2024 Actuals will be included in the 2025-2026 Proposed Budget. The next community survey will be conducted in late summer 2024.

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	2022-2023 Actuals	2023-2024 Target	2023-2024 Estimate	2024-2025 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%	85%	85%	85%
	2. % of customers who rate facility services as good or excellent based on timeliness of response and quality of work	76%	85%	85%	85%	85%
	3. % of health & safety concerns mitigated within 24 hours	81% ¹	100%	85% ¹	100%	100%
Provide and maintain equipment that meets customer needs	1. % of vehicles and equipment that is available for use when needed:					
	• Emergency Vehicles	100%	100%	100%	100%	100%
	• General Fleet	97%	97%	98%	98%	98%
	2. % of fleet in compliance with replacement cycle:					
	• Emergency Vehicles	100%	100%	100%	100%	100%
• General Fleet	83%	83%	85%	85%	85%	

¹ 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	2022-2023 Actuals	2023-2024 Target	2023-2024 Estimate	2024-2025 Target	5-Year Goal
Deploy technology resources effectively	1. % of customers rating services as "Good" or "Excellent"					
	-IT Overall	92.07%	≥80%	85%	≥80%	≥80%
	-Business Solutions	90.57%	≥80%	85%	≥80%	≥80%
	-Strategic Support	92.72%	≥80%	85%	≥80%	≥80%
	-Technology Infrastructure and Operations	92.41%	≥80%	85%	≥80%	≥80%
	-Help Desk	93.60%	≥80%	85%	≥80%	≥80%
	-Products-Projects Management	N/A ¹	≥80%	80%	≥80%	≥80%
	2. Uptime and availability					
	-Business applications	98.31%	≥99.9%	99.9%	≥99.9%	≥99.8%
	-Systems	99.31%	≥99.9%	99.8%	≥99.9%	≥99.8%
	-Network	99.80%	≥99.9%	99.9%	≥99.9%	≥99.8%
	3. % of project success (schedule, cost, scope, value)	73.05%	≥80%	80%	≥80%	≥80%

¹ The data was not available for 2022-2023 actuals. The department will conduct a separate survey for Products-Projects Management starting in 2024-2025.

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	2022-2023 Actuals	2023-2024 Target	2023-2024 Estimate	2024-2025 Target	5-Year Goal
Maintain City's bond ratings ¹	1. City's bond ratings: (General Obligation Bond Rating)					
	• Moody's	Aa1	Aa1	Aa1	Aa1	Aa1
	• Standard & Poor's	AA+	AA+	AA+	AA+	AA+
	• Fitch	AAA	AAA	AAA	AAA	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	95%	91%	95%	95%	95%
	2. % of payroll disbursements paid accurately and timely	99%	99%	99%	99%	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%	98%	99%

¹ 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 (\$)
FINANCE DEPARTMENT			
• Disaster Recovery and Grant Management Staffing	3.00	397,939	134,717
• Specialized Accounting Staffing		90,000	27,000
• Administrative Services Staffing		34,591	34,591
• Pension Obligation Bond Legal Fees		16,750	16,750
• Enterprise Resource Planning System Staffing		(218,974)	(218,974)
• Debt Management Staffing	(1.00)	(209,152)	(209,152)
• Revenue Management Staffing	(1.00)	(145,084)	(145,084)
• Revenue Compliance Staffing	(0.33)	(38,829)	(38,829)
• Accounting Staffing		(25,685)	(25,685)
• Rebudgets		1,410,000	1,410,000
<i>Subtotal</i>	0.67	1,311,556	985,334
HUMAN RESOURCES DEPARTMENT			
• Recruitment Staffing	3.00	412,314	412,314
• Classification and Compensation Staffing	1.00	158,066	158,066
• Learning and Development		(75,000)	(75,000)
• Rebudget		219,000	219,000
<i>Subtotal</i>	4.00	714,380	714,380
INFORMATION TECHNOLOGY DEPARTMENT			
• San José 311 Program	2.00	603,330	603,330
• Hyperconverged Infrastructure		440,000	440,000
• Equity through Data Staffing	1.00	243,694	243,694
• Cybersecurity Staffing	1.00	214,736	107,368
• Government AI Coalition		100,000	100,000
• Case and Data Management Platform Pilot		69,000	69,000
• Non-Personal/Equipment Savings		(415,300)	(415,300)
• Vacant Position Elimination	(1.00)	(261,971)	(261,971)
• Microsoft Azure Cloud Computing Platform and Services		(75,000)	(75,000)
• Development Services Staffing and Contractual Resources	(3.00)	(51,956)	(27,245)
• Rebudgets		4,141,083	3,787,506
<i>Subtotal</i>	0.00	5,007,616	4,571,382

**CITY SERVICE AREA
STRATEGIC SUPPORT**

ADOPTED BUDGET CHANGES

Adopted Changes	Positions	All Funds (\$)	General Fund (\$)
PUBLIC WORKS DEPARTMENT			
• Capital Project Management System Program Support	2.00	468,797	0
• City Hall Audio Visual Program Management Staffing	2.00	292,114	292,114
• Fleet Supervision Staffing	1.00	156,193	6,276
• GIS Enterprise Aerial Services		80,000	80,000
• New Fire Facilities Operations and Maintenance		54,000	54,000
• Adopt-A-Storm Drain Program		30,000	30,000
• Safety Placards		25,000	25,000
• Public Works Department Staffing Plan - Capital Improvement Program	(10.65)	(1,706,851)	(42,596)
• Vacant Position Elimination	(5.00)	(735,068)	(215,999)
• Janitorial Contract Services Savings		(630,000)	(630,000)
• Measure E - Interim Shelter Site Identification and Development (15% HSP)	(2.00)	(434,080)	0
<i>Subtotal</i>	(12.65)	(2,399,895)	(401,205)
Subtotal Departments	(7.98)	4,633,657	5,869,891
MAYOR, CITY COUNCIL, AND APPOINTEES			
Approved changes appear in the next section of this document	4.50	185,612,054	185,220,160
CITY-WIDE EXPENSES			
• ESUHSD Community WiFi - Network Maintenance		725,463	725,463
• Stormwater Fee Study		300,000	300,000
• Toyota Mobility Foundation Grant		260,000	260,000
• CaliforniansForAll Youth Workforce Program - Fiscal Administration		70,500	70,500
• Fellowship Support		(177,216)	(177,216)
• Rebudgets		8,042,577	8,042,577
GENERAL FUND CAPITAL, TRANSFERS AND RESERVES			
• Capital Contributions: Closed Landfill Compliance		320,000	320,000
• Capital Contributions: Animal Care and Services - Various Improvements		250,000	250,000
• Capital Contributions: Rebudgets		23,763,000	23,763,000
• Transfer to the Vehicle Maintenance and Operations Fund		(200,000)	(200,000)
• Earmarked Reserves: Measure E - Interim Housing Maintenance Reserve (15% HSP)		(2,500,000)	(2,500,000)
• Earmarked Reserves: Rebudgets		19,150,000	19,150,000

**CITY SERVICE AREA
STRATEGIC SUPPORT**

ADOPTED BUDGET CHANGES

Adopted Changes	Positions	All Funds (\$)	General Fund (\$)
<i>Subtotal Other Changes</i>	0.00	50,004,324	50,004,324
Total Adopted Budget Changes	(3.48)	240,250,035	241,094,375

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

CSA Priorities/Expected 2024-2025 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, including homelessness 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

2024-2025 Key Budget Actions

- Continues and makes permanent 1.0 Assistant to the City Manager position in the Office of Racial and Social Equity to oversee a disability accessibility portfolio. Responsibilities include assessing accessibility gaps, conducting community outreach, partnering with stakeholders, implementing city-wide training for organizational awareness, and advancing policy analysis and advocacy through a disability lens.
- Continues 1.0 Senior Executive Analyst position through June 30, 2025, in the City Manager's Office of Administration, Policy, and Intergovernmental Relations, and provides one-time non-personal/equipment funding of \$95,000 for outside professional services to design and implement an information dashboard for City Council Focus Area delivery.
- Continues 1.0 Assistant to the City Manager position through June 30, 2024, in the City Manager's Office of Administration, Policy, and Intergovernmental Relations, to assist with the implementation of the City Infrastructure Strategy.
- Makes permanent 1.0 Associate Deputy City Attorney position to continue the support of Gun Violence Restraining Orders.
- Eliminates 1.0 vacant Senior Deputy City Attorney position assigned to support the Planning, Building and Code Enforcement Department.
- Eliminates 1.0 Program Performance Auditor position, resulting in fewer audits per year and fewer recommendations to improve operations, enhance equity, or reduce risks to the City.
- Eliminates 1.0 Analyst position that supports City-wide contract management and Public Records Act requests for the Mayor and Council Offices in the Office of the City Clerk.
- Adds non-personal/equipment funding in the Office of the City Clerk to pilot use of Artificial Intelligence interpretation services for all City Council meetings and City Council Committee meetings.
- Adds ongoing funding in City-Wide Expenses for the Office of the City Clerk to pilot an external review of City Council Appointee performance with an outside consultant.
- Adds ongoing funding to the Office of the Mayor (\$8,710) and City Council Offices (\$263,180) to account for salary increases that were approved by the Salary Setting Commission on April 17, 2024.
- Adds 1.0 Senior Office Specialist position in the Retirement Benefits Division for the Office of Retirement Services to provide customer service for ongoing, pension-related inquiries and requests.
- Makes permanent 1.0 Analyst I/II position in the Retirement Benefits Division to support timely delivery of retiree health benefits to approximately 11,651 retirees, dependents and survivors who are currently enrolled in one or more sponsored or voluntary benefit plans.

STRATEGIC SUPPORT

MAYOR, CITY COUNCIL AND APPOINTEES

BUDGET SUMMARY

Mayor, City Council and Appointees Budget Summary

	2022-2023 Actuals **	2023-2024 Adopted	2024-2025 Forecast	2024-2025 Adopted
Dollars by Core Service *				
<i>Mayor & City Council</i>				
City Council	9,901,207	12,727,420	10,114,876	12,935,056
Council General	49,832	49,670	49,670	49,670
Office Of The Mayor	4,522,728	5,152,455	5,042,774	5,151,484
<i>Office of the City Attorney</i>				
Legal Services	21,576,869	22,424,504	24,289,913	24,289,972
Strategic Support - City Council Appointees	1,833,928	1,919,016	2,049,310	2,049,310
Strategic Support - Other - Council Appointees	3,624,298	20,261,174	7,159,325	20,925,263
<i>Office of the City Auditor</i>				
Audit Services	2,621,234	3,456,225	3,652,052	3,510,147
Strategic Support - City Council Appointees	173	184,872	201,964	201,964
Strategic Support - Other - Council Appointees	406,861	0	0	0
<i>Office of the City Clerk</i>				
City Clerk Services	2,928,138	3,690,851	3,720,967	3,618,571
Strategic Support - City Council Appointees	548,928	197,596	209,145	209,145
Strategic Support - Other - Council Appointees	5,563,952	6,203,926	5,406,102	6,599,907
<i>Office of the City Manager</i>				
Lead & Manage The Organization	18,217,602	22,399,724	20,888,506	28,531,526
Strategic Support - City Council Appointees	4,209,088	5,683,473	223,039	163,979
Strategic Support - Other - Council Appointees	4,350,785	7,543,029	400,151	1,525,650
<i>Independent Police Auditor's Office***</i>				
<i>Office of Retirement Services</i>				
Retirement Plan Administration	5,264,657	5,765,124	6,323,436	6,600,468
Strategic Support - City Council Appointees	3,180,600	3,011,749	3,262,573	3,262,573
Strategic Support - Other - Council Appointees	16,107	30,000	30,000	30,000
Core Service Subtotal	\$88,816,988	\$120,700,808	\$93,023,803	\$119,654,685
 Authorized Positions****	 261.00	 271.00	 265.00	 269.50

* 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 2022-2023 Actuals column reflect those included in the 2022-2023 Adopted Budget. 2022-2023 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

Adopted Changes	Positions	All Funds (\$)	Fund (\$)
MAYOR AND CITY COUNCIL			
• Mayor and City Council Salaries		271,890	271,890
• Rebudgets		2,657,000	2,657,000
<i>Subtotal</i>		2,928,890	2,928,890
OFFICE OF THE CITY ATTORNEY			
• Gun Violence Restraining Order Staffing	2.00	356,386	356,386
• Cannabis Regulation Program Staffing		0	(55,928)
• Legal Transaction Staffing	(1.00)	(356,327)	(338,511)
<i>Subtotal</i>	1.00	59	(38,053)
OFFICE OF THE CITY AUDITOR			
• Program Performance Audit Staffing	(1.00)	(141,905)	(141,905)
<i>Subtotal</i>	(1.00)	(141,905)	(141,905)
OFFICE OF THE CITY CLERK			
• Automated Interpretation Services		80,000	80,000
• Contracts and Public Records Staffing	(1.00)	(182,396)	(182,396)
<i>Subtotal</i>	(1.00)	(102,396)	(102,396)
OFFICE OF THE CITY MANAGER			
• Outcomes, Equity Indicators, and Performance Management Staffing & Dashboard	1.00	359,276	359,276
• Disability Accessibility and Community Engagement Staffing	1.00	285,927	285,927
• Fire Department Assessment		150,000	150,000
• Office of Administration, Policy, and Intergovernmental Relations - Resiliency Strategy Staffing	1.00	76,750	0
• Office of Administration, Policy, and Intergovernmental Relations - Agenda Services Support Staffing	0.50	3,000	3,000
• Office of Employee Relations – Employee Engagement and Labor Negotiations Staffing Realignment	0.00	0	0
• Office of the City Manager – Non-Personal/Equipment Savings		(107,000)	(107,000)
• Office of the City Manager – Personal Services Realignment	0.00	(215,500)	(215,500)
• Rebudgets		160,000	160,000
<i>Subtotal</i>	3.50	712,453	635,703
OFFICE OF RETIREMENT SERVICES			
• Benefits Program Staffing	1.00	161,110	
• Customer Service Staffing	1.00	115,922	
<i>Subtotal</i>	2.00	277,032	0
<i>Subtotal Departments</i>		4.50	3,674,133
		3,282,239	

CITY SERVICE AREA
MAYOR, CITY COUNCIL AND APPOINTEES

ADOPTED BUDGET CHANGES

Adopted Changes	Positions	All Funds (\$)	Fund (\$)
CITY-WIDE EXPENSES			
• 2023-2026 Adaptation Planning Grant		135,000	135,000
• Climate and Seismic Resilience Planning		(200,000)	(200,000)
• Council Appointee Review Process		75,000	75,000
• Executive Leadership/City Management – Customer Service Vision and Standards Implementation		3,000,000	3,000,000
• Homelessness Services and Solutions		215,500	215,500
• Measue E - Homelessness Coordination Team		(1,100,000)	(1,100,000)
• State Homeland Security Grant Program - CMO 2022		30,000	30,000
• Rebudgets		19,684,311	19,684,311
GENERAL FUND CAPITAL, TRANSFERS AND RESERVES			
• Earmarked Reserves: Deferred Infrastructure and Maintenance Reserve		(2,000,000)	(2,000,000)
• Earmarked Reserves: Salaries and Benefits Reserve		(8,721,890)	(8,721,890)
• Earmarked Reserves: Rebudgets		170,820,000	170,820,000
<i>Subtotal Other Changes</i>	0.00	181,937,921	181,937,921
<hr/>			
Total Adopted Budget Changes	4.50	185,612,054	185,220,160

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

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.

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

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 2024-2025 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 2023 approximately 79% of the 669 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 2024-2025 Audit Workplan was approved by City Council in August 2024.
- ✓ Provide performance reporting and enhance the display of online performance information. In December 2023, the Office published the City's sixteenth *Annual Report on City Services*. The Office will continue this project in 2024-2025 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.

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

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 City 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 along with over 50 other languages for City Council meetings, study sessions, and committee meetings using artificial intelligence technology;
- ✓ 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, City Council Salary Setting Commission, and City 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).

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

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.

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

- ✓ Focus on providing the 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.
- ✓ 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.
- ✓ 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.
- ✓ 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, training, tools, and capacity building that advances racial and social equity, through decision-making that strongly considers historically underserved communities through the intersections of race, ethnicity, national origin, immigration status, gender, sexual orientation, disability, religion, and other forms of marginalization.
- ✓ 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 when the City recovers from extreme weather events to ensure community and economic recovery efforts are equitable and comprehensive.

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 and Committee 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 monitoring 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, 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 2024-2025 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 budget, with close to 140 Operating and Capital funds, impacting approximately 7,000 budgeted 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.

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

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 Annual Comprehensive Financial Report (ACFR) and the Popular Annual Financial Report (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.