

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
OVERVIEW

Mayor, City Council and Appointees

Expected 2020-2021 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 public safety, maintaining streets and roads, reducing homelessness, combatting blight, and economic development.
- ❑ 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
OVERVIEW

2020-2021 Key Budget Actions

- ❑ Reduces ongoing funding for the Office of the Mayor by \$387,500.
- ❑ Reduces ongoing funding for each City Council Office, totaling \$631,750.
- ❑ In alignment with City Council's approval of the Mayor's June Budget Message for Fiscal Year 2020-2021, one-time funding of \$1.0 million, of which \$750,000 is allocated for personal services and \$250,000 for nonpersonal/equipment uses, was added to establish the Office of Racial Equity for the advancement of a city-wide racial equity framework that will examine and improve the City's internal policies, programs, and practices that ultimately improve outcomes for Black, Indigenous, and People of Color.
- ❑ As directed by the Mayor's March Budget Message for Fiscal Year 2020-2021, begins to stabilize the Office of Civic Innovation by adding 3.0 ongoing positions and continuing 2.0 limit-dated positions through June 30, 2022, offset by eliminating 1.0 position in the City Manager's Office.
- ❑ The Office of the City Manager eliminates 2.0 positions in the Office of Employee Relations, 1.6 positions and a portion of the overtime budget in the Budget Office, and 1.0 position in the Office of Communications. Reorganizes and eliminates 1.0 positions in the Office of Administration, Policy and Intergovernmental Relations, as well as, 1.0 administrative staff. Current work assignments will be absorbed by existing staff and there will be some reduced administrative, analytical and management capacity.
- ❑ As directed in the Mayor's March Budget Message for Fiscal Year 2020-2021, continues a 1.0 Senior Deputy City Attorney position through June 30, 2022 to support the Affordable Housing Program in the Low and Moderate-Income Housing Asset Fund in the City Attorney's Office.
- ❑ Eliminates 2.5 vacant positions (1.0 Legal Analyst II, 1.0 Legal Administrative Assistant II, and 0.5 Messenger Clerk PT) in the Office of the City Attorney. The remaining workload will be reallocated to current staff.
- ❑ Eliminates 1.0 filled Program Performance Auditor I/II position in the Office of the City Auditor, which will result in fewer performance audits.
- ❑ Eliminates 1.0 filled Office Specialist II position which will affect timeliness and responsiveness to requests to both internal and external customers in the Office of the City Clerk.

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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

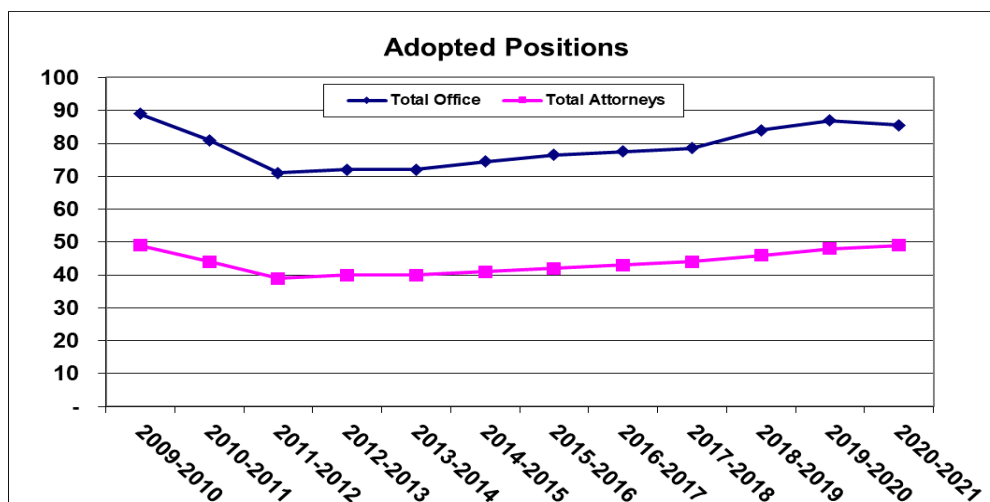
Strategic Support Office of the City Attorney OVERVIEW

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.
- The Office has coordinated with the Finance Department to pursue more collection cases resulting in increased revenue to the City.
- The Office of the City Attorney has successfully increased the handling of Gun Violence Restraining Orders. 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.
- The Office has worked on a variety of matters with the Clean Energy Department to address the impacts of the PG&E Bankruptcy. In addition, the Office has assisted the Department in various filings with the California Public Utilities Commissions to address issues related to rates and procurement of energy for the City's ratepayers.
- Since the City's declaration of the local emergency related to COVID-19, attorneys working remotely, have worked with City staff to address the myriad of resulting issues and impacts, including 1) eviction moratorium and residential rent freeze ordinances, 2) agreements related to housing the unsheltered, 3) agreements related to food distribution, 4) advising on FEMA and CARES Act funding and 5) advising on the implementation of the County and State Orders.

Service Delivery Environment

- The total budget decrease may jeopardize the Office's ability to meet basic daily operational demands and involve risks that could adversely affect the City. 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. If the funding for these expenditures is not adequate, it may be more difficult to effectively advocate the City's position.
- Staffing has remained almost static over the last eleven years and remain lower than 2009-2010 levels. General Fund budget reduction actions will decrease Office resources to minimum levels at a time when the demand for legal services has increased. The Office is approved to have 85.5 positions in 2020-2021 compared to 89 positions in 2009-2010.



**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, 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, or substantially completed, 19 audit projects or approximately 1.6 audits per auditor (Target: 1.5 audits per auditor).
- During 2019-2020, the Office identified \$9,340,942 in potential cost savings or revenue enhancements, achieving a ratio of about \$3.67 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 the Parks and Recreation bonds, Library bonds, Public Safety bonds, and Parcel Tax funds; and the Semi-Annual Reviews for compliance with the City's Investment Policy.
- The Office followed up on over 270 open audit recommendations. Over the past ten years, departments have implemented or closed about 73 percent 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. About 57 percent 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, and efficient 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 Office of the City Manager 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.

**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, and effectiveness of City government. The Office's 2020-2021 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 2019 approximately 73% of the 860 recommendations made over the last 10 years have been implemented.
- ✓ The Office looks forward to participating in the implementation of the *Smart City Vision* by improving the availability and usage of audited performance data and focusing audit recommendations on improving City services through better use of technology.

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 2020-2021 Audit Workplan was approved by the City Council in August 2020.
- ✓ Provide performance reporting and enhance the display of online performance information. In December 2019, the Office published the City's twelfth *Annual Report on City Services*. The Office will continue this project in 2020-2021, and will continue to work with City staff on audit projects designed to improve the City's performance management and reporting systems as outlined in the 2009 *Performance Management and Reporting in San José: A Proposal for Improvement* report.
- ✓ Continue to improve the 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.

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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 OUTCOME

- 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 2019-2020, the Office:

- Conducted an election for City Councilmembers, and ballot measures; worked with proponents of initiatives in accordance with the City Charter and the State Elections Code; 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. All City Council and City Council committee meetings were web-cast live, indexed, and archived for on-demand replay.
- Provided access to the City's legislative records and documents; reviewed and executed all 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.

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.
- 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;
- ✓ Continue to conduct virtual Council Meetings and City Board, Commissions, and Committee meetings as needed in coordination with the Office of the City Manager;
- ✓ 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 the 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
Office of Retirement Services

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 Vision

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, advanced the City Manager's eight Enterprise Priority work plans, and provided leadership through the COVID-19 pandemic by ensuring the continuation of essential City services, providing vulnerable residents with new services, and keeping City employees safe and supported.
- **Office of Administration, Policy, and Intergovernmental Relations** processed over 800 contracts; reviewed over 700 City Council Agenda reports; assigned and tracked 85 Council Referrals; and advocated for the City at the state and federal level through six City-sponsored bills.
- **Budget Office** provided ongoing review, monitoring, analysis, forecasts, and reporting on the City's 130 Operating and Capital funds totaling \$4.7 billion with 6,647 positions, allowing for effective oversight and controls throughout the fiscal year, including rebalancing several funds in 2019-2020 and resolving significant budgetary shortfalls anticipated for 2020-2021 in response to COVID-19.
- **Communications Office** coordinated response to over 80 multi-department Public Records Act requests; rolled out the City's new website; provided support for the Emergency Operations Center activation during PG&E Public Safety Power Shutoff (PSPS) events and COVID-19; and supported the transition to virtual City Council meetings on CivicCenterTV.
- **Office of Civic Innovation** issued \$1 million in digital inclusion grants; developed city-wide digital privacy principles; launched Wi-Fi for the James Lick High School community; permitted over 1,700 4G and 5G small cells to improve broadband speed and capacity by 500%; and built food and necessities distribution to serve 3 million meals per week to COVID-19 vulnerable and at-risk residents.
- **Office of Emergency Management (OEM)** hosted an UnConference to create a community-based plan for a seismic event, planned and responded to PG&E PSPS events, and responded to COVID-19. OEM also conducted the first City Council emergency response exercise and delivered 13 CERT courses and graduated 326 participants.
- **Office of Employee Relations (OER)** negotiated agreements with International Union of Operating Engineers, Local No. 3 (OE#3), Peace Officer Park Ranger Association (POPRA), and the San José Police Officers' Association (SJPOA), convened the Retirement Stakeholder Solutions Working Group, and continued to conduct training and personnel investigations. OER also oversaw new leave entitlement programs created by federal law and redeployed hundreds of City employees in response to COVID-19.
- **Office of Immigrant Affairs (renamed to Office of Racial Equity)** delivered language access training to nearly 200 staff, facilitated the submission of 397 naturalization applications, and supported the Rapid Response Network, which has received 6,269 hotline calls from June 2017 - June 2020 and trained 1,300 volunteers who have responded 24/7 to nearly 200 alerts of immigration enforcement activity.

Strategic Support Office of the City Manager OVERVIEW

Service Delivery Environment

The City Manager's Enterprise Priorities provide a statement of the critical issues ahead: Emergency Management & Preparedness; Creating Housing & Preventing Homelessness; Safe, Vibrant, and Inclusive Neighborhoods & Public Life; Building the San José of Tomorrow - Private Development Services; the Future of Downtown; and Smart & Sustainable City: 21st Century Infrastructure. The internally focused enterprise priorities – Strategic Fiscal Positioning & Resource Deployment, and Powered by People – serve as the foundation to accomplish the other priorities, as well as, other City services.

Budget Dollars at Work: Performance Goals

This section organizes the key goals and objectives of the Office of the City Manager based on three outcomes. These priorities guide the efforts of City Service Areas (CSAs) and departments in providing services.

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, more efficient, and more sustainable organization for the future.
- ✓ Establish the City Manager's Office of Racial Equity to advance a city-wide equity framework that will examine and improve San José'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 Black, Indigenous, and People of Color.
- ✓ Implement an aggressive communication plan for community outreach, ensuring the City's diverse population has access to City Hall and critical information.
- ✓ Provide organizational improvement efforts to change the way 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.
- ✓ Work with regional governance partners on Bay Area inter-agency issues.
- ✓ 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.
- ✓ Ensure public access to current and accurate City data that is not otherwise protected through an ongoing focus on the Open Data initiative.

**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

- ✓ Monitor the fiscal and economic environment and adjust the 2020-2021 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 2021-2022 that reflect City Council and community goals and help ensure fiscal stability.
- ✓ Provide support to the City Council in implementing fiscal sustainability and other potential ballot measures or initiatives.
- ✓ Strengthen the City-County partnership by meeting regularly with the County Executive, supporting meetings between key City and County elected officials, and focusing attention on issues of shared services between the organizations.
- ✓ Continue the City Council Initiated Policy Priority-Setting process—ensuring Council can act and drive policy recommendations to meet community needs.
- ✓ Implement streamlined approaches for agenda management, including paperless distribution and use of technology and online agenda management services.
- ✓ Provide timely City Council Referral reports and Information Memos that support the ability to monitor and pace organization workload, reevaluate priorities periodically, and focus resources strategically.
- ✓ Invest in intergovernmental relations with the key focus on advocacy for the City's needs at the regional, State, and federal levels, as well as training and coordinating with departments to make San José's voice heard.
- ✓ Provide staff expertise and support for City Council committees.

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

- ✓ Build ongoing communication between the City Manager and employees.
- ✓ Continue to ensure San José's position as a model 21st century city by engaging the City Council on SMART City implementation, including policy, advocacy, and funding priorities.
- ✓ Make pursuing grants and partnerships a top priority given the significantly limited funding available for infrastructure and new initiatives.
- ✓ 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.

**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 VISION

- ✓ Continue to provide the leadership and strategically target efforts to challenge the organization to continue developing innovative ways to deliver services and streamline operations to be more efficient.
- ✓ Foster constructive and professional working relationships with the City's employee labor unions.
- ✓ Invest in employees by aligning their development needs with the current and future needs of the City.
- ✓ Continue to 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.

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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 Retirement Services
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

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

Strategic Support Office of Retirement Services OVERVIEW

Service Delivery Accomplishments

- Hired a new communications consultant to assist with the Office of Retirement Services (ORS) quarterly newsletter, The Retirement Connection, the first of which was issued in January 2020.
- Completed recruitment for a new IT Manager in September 2019. Current projects include the website redesign planned to be completed by December 2020.
- Launched the new Member portal, known as MemberDirect, which provides better access to Active and Retirees' accounts.
- Completed lease negotiations for the building for another five years.
- Completed implementation of Measure F.
- Quickly implemented the Boards' decision to change the strategic asset allocation for both plans to take advantage of market opportunities amid the COVID-19 pandemic.

Service Delivery Environment

- Work with new communications consultant to develop a strategic communications plan, including incorporating the social media presence for ORS.
- Complete Requests for Proposals for legal services and for custodian bank services.
- Implement performance metrics for the Chief Executive Officer and Chief Investment Officer.
- Publish revised Tier 1 and Tier 2 Member Handbooks.
- Identify return-driven investment opportunities, balancing risk, amid the global economic impacts of the COVID-19 pandemic.

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, which seeks to mitigate the intergenerational shifting of liabilities.
- 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 the 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 CAFR and the PAFR, to maintain accountability and provide fiscal transparency.

**Strategic Support
Office of Retirement Services
OVERVIEW**

Budget Dollars at Work: Performance Goals

OUTCOME 2: INVESTMENT OF ASSETS TO SATISFY PLANS' OBLIGATIONS

- Manage Retirement Plan assets in a manner which seeks to achieve long-term net returns in excess of 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 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 due diligence 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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