

# **Jacksonville City Council**

## **2022 ECA Manual**



**Margaret M. "Peggy" Sidman  
Director/Council Secretary**

August 2022

**TABLE OF CONTENTS**

- I. INTRODUCTION.....2**
- II. CHAPTER 15 – JACKSONVILLE SUNSHINE LAW COMPLIANCE ACT.....2**
  - Sec. 15.101. Statement of purpose.....2
  - Sec. 15.102. Applicability; Public Meeting, Location defined.....2
  - Sec. 15.103. Notice of Council Public Meetings; posting and timing.....2
  - Sec. 15.104. Public Meetings location.....3
  - Sec. 15.105. Public Meeting; commencement and adjournment.....3
  - Sec. 15.106. Public Meetings minutes.....3
  - Sec. 15.107. Biannual (every two years) review and report on Council notices, meeting locations, and minutes.....4
  - Sec. 15.108. Annual continuing education and training.....5
  - Sec. 15.109. Recommendations for improved compliance.....5
- III. PUBLIC NOTICE / INFORMATION SYSTEM.....6**
  - Map of Districts and Zip Codes.....7
  - City Administrative Branch Organizational Chart.....8
- IV. COUNCIL PUBLIC MEETINGS.....10**
  - SAMPLE 1 – Notice-Two Elected Officials.....14
  - SAMPLE 2 – Amended Notice-Two Elected Officials.....15
  - SAMPLE 3 – Cancellation Notice.....16
  - SAMPLE 4 – Meeting Notice-Two Members Regarding Legislation.....17
  - SAMPLE 5 – Excusal-All Council Related Business.....18
  - SAMPLE 6 – Excused Absence-Standing Committee.....19
  - SAMPLE 7 – Excused Lateness Request-Standing Committee.....20
  - Community Meeting/Town Hall Checklist.....21
  - Assessment Checklist.....22
  - Council Calendar - Reserving City Council Meeting Rooms.....23
  - Visitor & Guest Procedures.....26
- V. COMPLIANCE.....27**
  - GIFT DISCLOSURE – Web Posting.....27
  - LOBBYIST LIST – Web Posting.....28
  - SECONDARY EMPLOYMENT - Disclosure.....29
  - RECORDS RETENTION GUIDELINES.....32
  - TEXT MESSAGES.....36
  - CITY COUNCIL POSTAGE.....37
  - EX PARTE.....38

## I. INTRODUCTION

This manual is a guide for use by Executive Council Assistants (ECA). This book is intended to be a helpful guide and a living document for use in completing ECA duties but is not designed to be a complete definite checklist of job tasks. The forms contained in this manual are located at G:\Shared\ECA Helpful Files.

In accordance with Chapter 15 – Jacksonville Sunshine Law Compliance Act, *Jacksonville Municipal Code* (as amended by Ord. 2007-733-E, § 1, Ord. 2008-329-E, § 1, and Ord. 2010-135-E, § 1), the Director/Council Secretary has placed the following procedures in place for compliance with the above stated legislation.

**ORDINANCE CODE**  
**CITY OF JACKSONVILLE, FLORIDA**  
\*\*\*  
**TITLE II LEGISLATIVE BRANCH**  
\*\*\*

## II. Chapter 15 – JACKSONVILLE SUNSHINE LAW COMPLIANCE ACT

### **Sec. 15.101. Statement of purpose.**

The purpose of the Jacksonville Sunshine Law Compliance Act is to ensure compliance with the Sunshine Law, F.S. Ch. 286, and to create procedures, methods, best practices and education that will enhance compliance with open meeting laws and enhance and maintain public confidence and transparency in the legislative practices of the City Council.

### **Sec. 15.102. Applicability; Public Meeting, Location defined.**

- (a) The Jacksonville Sunshine Law Compliance Act shall apply to the Jacksonville City Council and those public meetings of the Council that are contemplated by F.S. Ch. 286, including meetings of the Council and Council committees, and meetings between and amongst Council Members. These meetings shall hereinafter be identified in this Chapter as "Council Public Meetings". Since other agencies are already obligated to comply with Florida's Sunshine Law, Ch. 286, F.S., even if Council Members serve thereon or attend, the Jacksonville Sunshine Law Compliance Act shall not be applicable to the noticed meetings of the various other commissions and agencies established by law, ordinance or executive order.
- (b) *Public location* shall mean any government owned building.

### **Sec. 15.103. Notice of Council Public Meetings; posting and timing.**

- (a) All council public meetings shall be publicly noticed in a timely manner. The notices required shall include at a minimum (i) the date and time of the meeting noticed, (ii) the date and time the notices are posted, (iii) the location of the meeting, and (iv) the general subject matter of the meeting, and (v) the Council Member calling the meeting and any other Council Members who, at the time of notice, are expected to be in attendance.

- (b) Council Public Meeting notices shall be provided on the Council's internet website, which utilizes modern technology and provides swift public notice to all of Jacksonville. In addition to the internet, posting of notices shall be made at such locations at City Hall where public meetings are generally noticed, and by such other methods as may be appropriate or required by particular circumstances.
- (c) Notice of Council Public Meetings shall be posted for at least 24 hours prior to the meeting, not including weekends and holidays.
- (d) Notwithstanding subsection (c) above, notice of Council Public Meetings may be posted for a period of less than 24 hours, only in the event of an emergency, and when approved in writing by the Council President and with notice to the City's Ethics Director.
- (e) A copy of the notices of all Council Public Meetings shall be provided to and maintained in a retrievable format and filing system developed by the Legislative Services Division.
- (f) The Director/Council Secretary shall develop and implement standardized policy and procedures for City Council sunshine meeting notices and uniform calendaring practices.

**Sec. 15.104. Public Meetings location.**

- (a) All Council Public Meetings shall be conducted in such places as will assure open, reasonable, and convenient access to the public.
- (b) The locations for Council Public Meetings include the Council Chambers and public conference, meeting, or committee rooms. Public meetings shall not be held in the individual offices of Council Members, except in the event of exigent circumstances.
- (c) Public locations shall be used for all Council Public Meetings, unless other locations are approved in writing. A request therefore shall be made in one written submission to both the City Ethics Officer and the Office of General Counsel Ethics Liaison, with a copy thereof delivered to the Council President. Written approval shall be required from either the City Ethics Officer or the Office of General Counsel Ethics Liaison, with a copy thereof provided to the Council President and to the other approving authority.

**Sec. 15.105. Public Meeting; commencement and adjournment.**

The business and conversations conducted during a noticed Council Public Meeting shall commence upon the chair's or Council Member's opening of the meeting and shall conclude upon adjournment. The mere fact that a meeting has been noticed, does not authorize action or discussions prior to the opening of the meeting or following its adjournment.

**Sec. 15.106. Public Meetings minutes.**

- (a) Each Council member is responsible for the taking and preparation (or delegation thereof) of the minutes of each Council Public Meeting noticed by that Council Member, in a manner as required by F.S. Ch. 286, and subsection (c) below.
- (b) The Director/Council Secretary shall be responsible for developing and implementing procedures for assuring:

- (1) Minutes are written for all noticed Council Public Meetings;
  - (2) Minutes are filed; and
  - (3) A system for the maintenance and retrieval of minutes is developed for all minutes of Council Public Meetings.
- (c) The minutes of every Council Public Meeting conducted between two or more Council Members outside of the regular Council meeting or committee meeting structure shall reflect, at a minimum:
- (1) The location, date and time the meeting commenced and adjourned;
  - (2) The members of the Council, other public officials and employees, and registered lobbyists in attendance;
  - (3) The substance of the discussions and positions presented by the persons in attendance.
- (d) A copy of the minutes of all noticed Council Public Meetings shall be kept, with the notice to such meetings, by the Legislative Services Division. The Legislative Services Division shall develop such systems and policies as are necessary for the orderly filing, maintaining and retrieval of minutes.
- (e) No less than once every 30 days, the Legislative Services Division shall review notices of all Council Public Meetings to ensure that copies of the minutes of all applicable public meetings have been placed on file in the Legislative Services Division.

**Sec. 15.107. Biannual (every two years) review and report on Council notices, meeting locations, and minutes.**

- (a) The Inspector General's Office shall review information provided by the Legislative Services Division regarding:
- (1) The notices of Council Public Meetings;
  - (2) The location of such public meetings; and
  - (3) Written minutes of such public meetings, and prepare an annual report thereon.

The Inspector General shall file such report with the Council committee to which audit matters are referred, the Council President, the City Ethics Officer, and the Ethics Commission, who may comment thereon.

- (b) The report, as required by subsection (a) above, shall include confirmation, through methods and means developed by the Inspector General, that:
- (1) Notices were public and timely, and not less than 24 hours exclusive of weekends and holidays, and accessible to the public by internet;
  - (2) That meetings were located in appropriate public rooms, with a list of all meetings held in Council Members' offices;
  - (3) That minutes were written, maintained in the filing system, and available for retrieval; and
  - (4) That all Council Members and Executive Council Assistants have received annual continuing education and training on the Sunshine Law;

and shall provide recommendations, as appropriate to improve compliance, as authorized by Section 15.109 below. The report shall be based upon a review of that information collected and provided by the Council Secretary/designee, and any other information that is known to the Inspector General.

- (c) The Inspector General's review shall commence in even number years on May 1st, 60 days prior to installation of a new Council President, and the report shall be provided no later than June 1. The Inspector General's review shall be based upon statistically significant samples from the preceding two years.

**Sec. 15.108. Annual continuing education and training.**

- (a) Council Members and Executive Council Assistants shall receive, and the Office of the General Counsel, with the assistance of the City Ethics Director, the Director/Council Secretary and other supporting agencies, shall provide annual training on Government in the Sunshine, open meetings laws and ethics laws.
- (b) The date, format, time, and duration of this training shall be determined by the Director/Council Secretary, Director of Ethics, and Office of General Counsel and shall be utilized to fulfill the requirements of F.S. § 112.3142.
- (c) All Council Members and Executive Council Assistants shall be provided materials in electronic format.
- (d) In addition to annual training, training on Government in the Sunshine, open meetings laws and ethics shall be provided upon special request. These presentations may be given at committee or Council meetings or at other times as may be directed by the Council President.

**Sec. 15.109. Recommendations for improved compliance.**

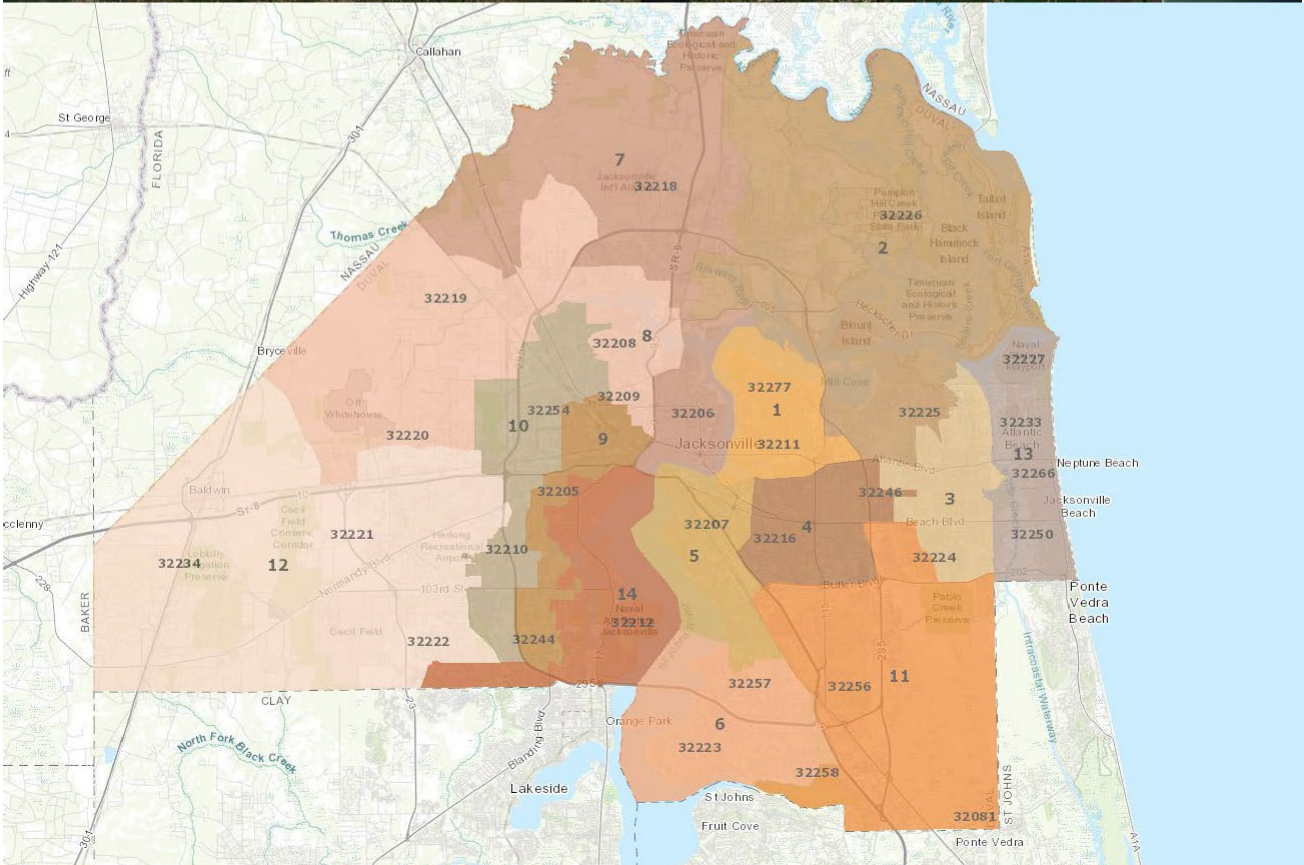
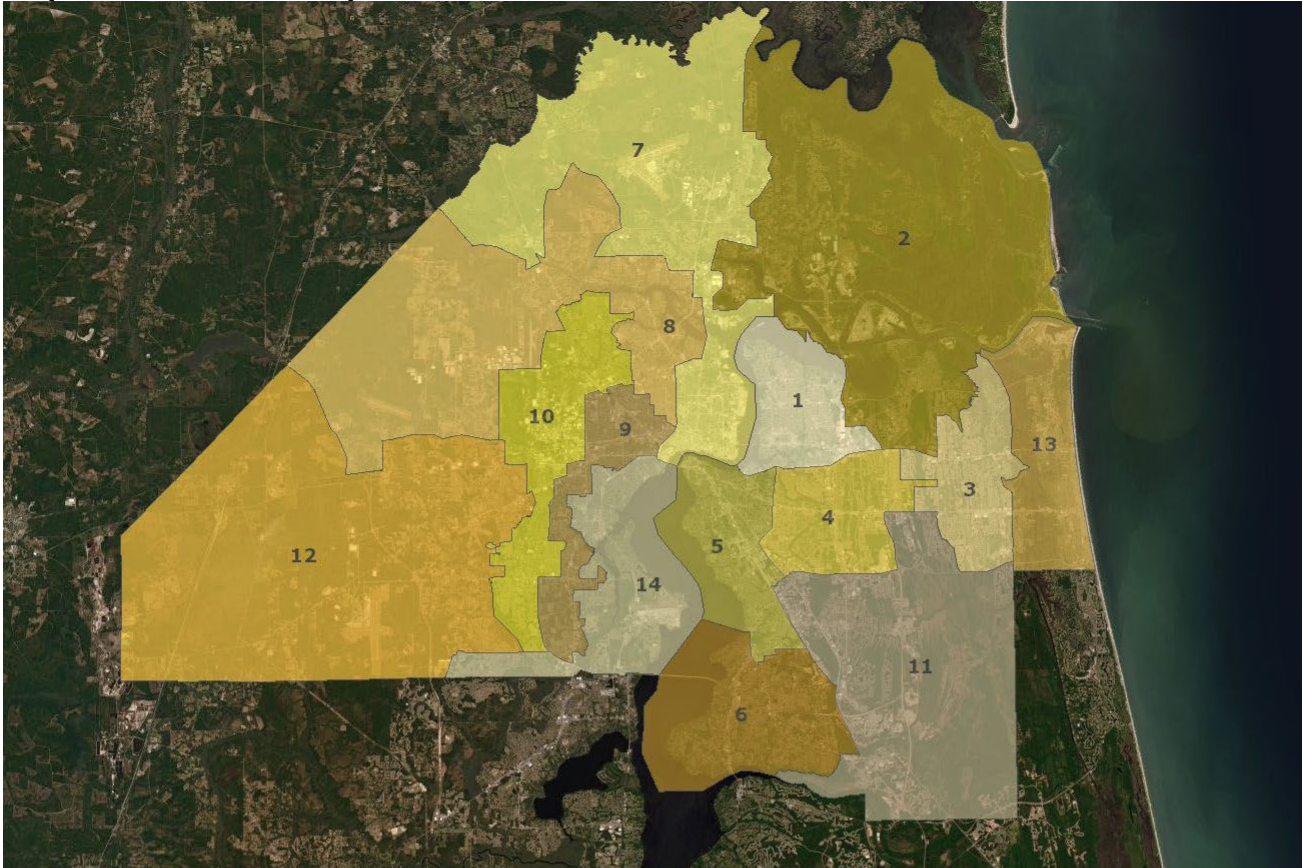
The Director/Council Secretary, the City Ethics Director, and the Office of General Counsel, may make recommendations for improvements to this Chapter to the City Council.

### III. PUBLIC NOTICE / INFORMATION SYSTEM

The City Council, through the Office of the Director/Council Secretary, maintains a Public Notice System comprised of several components:

- **City Council Resources Calendar** – Manages the reservation of City Council meeting spaces.
- **[Council Web Calendar](#)** – Provides both web access and City Hall electronic kiosk viewing of upcoming scheduled City Council meeting events.
- **[Public Notice Web Application](#)** – Provides web access for public viewing of notices and minutes for meetings between and amongst Council Members.
- **[Online Council Agendas, Matters Pending, and Minutes](#)** – Provides web access for public viewing of agendas, meeting minutes, matters pending, and bill summaries of all meetings of the Council and the standing committees of the Council.
- **Council and Council Committee Video** – Provides both web streaming video of in-session meetings:
  - a) [Microsoft Window Devices](#)
  - b) [Apple Devices](#)
  - c) [Web access](#) - for public viewing of archived MP4 files of past meetings of the Council and the standing committees of the Council.
- **[Council Invocations](#)** – Provides web access to the list of individuals offering the invocation at City Council meetings.
- **[Gift Disclosure Registry](#)** – Provides web access for public viewing of City Council Gift disclosure.
- **[Internal Council Email Online](#)** – Provides web access for public viewing of the incoming email received by the internal [CityC@coj.net](mailto:CityC@coj.net) email account. All notices and documents to be posted to the Public Notice System **must** be sent to [CityC@coj.net](mailto:CityC@coj.net).
- **Legislative Bill Search** – Provides web access for public viewing of active and past legislation.
  - a) [Old System – Legislation Prior to July 15, 2019](#)
  - b) [New System – Legislation After July 15, 2019](#)
- **[Lobbyist Registry](#)** – Manages the registration of individuals that lobby the City and provides web access for public viewing of active and past lobbyists and issues.
- **[Municipal Ordinance Code/City Charter Online](#)** – Provides web access for public viewing of the Municipal Ordinance Code and City Charter via an external website maintained by Municipal Code Corporation.
- **[Rules of the Council Online](#)** – Provides web access for public viewing of the Rules of the Council.
- **[Public Records Request via GovQA](#)** – Provides access for public viewing of records.
- **[Jacksonville Maps](#)** – Provides viewing of maps for the City of Jacksonville.

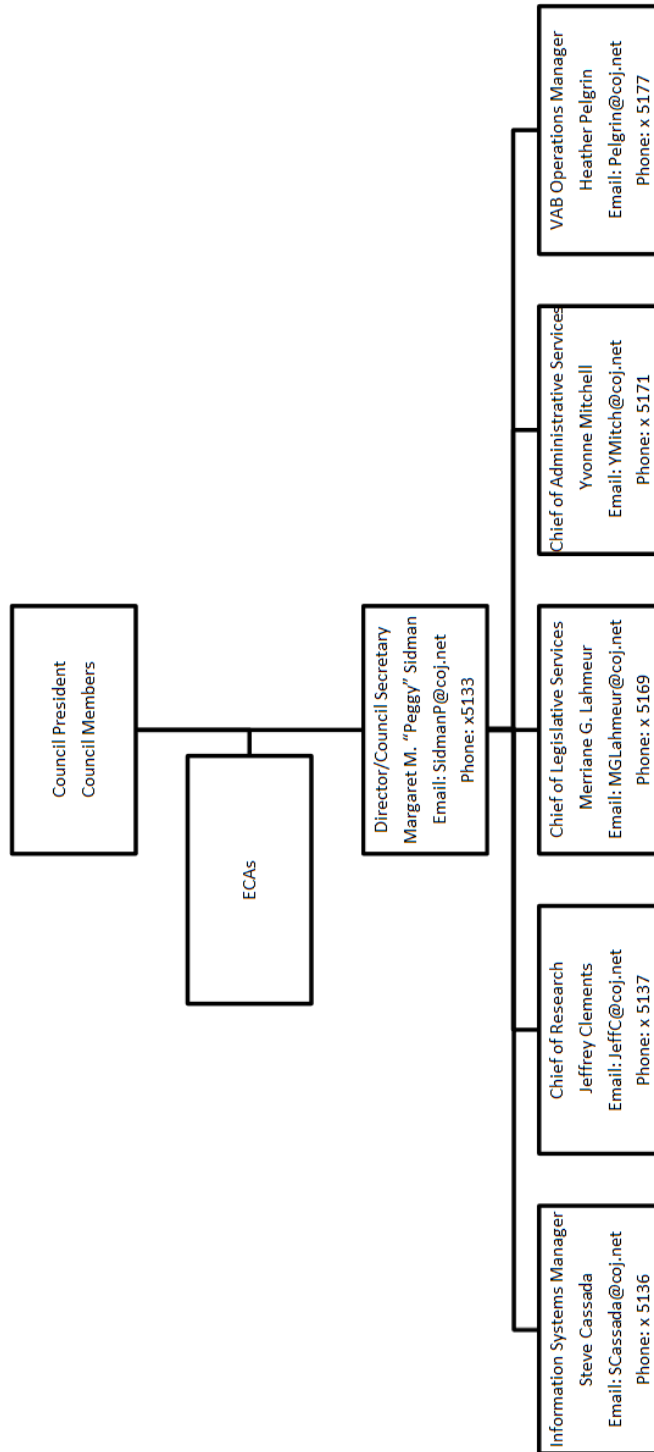
# Map of Districts and Zip Codes







# City Legislative Branch Organizational Chart



#### **IV. COUNCIL PUBLIC MEETINGS**

All meetings of the Council and the committees of the Council and meetings between and amongst Council Members are posted to the various components of the Public Notice/Information System.

##### **COUNCIL STAFF RESPONSIBILITY**

The personnel employed by the Director/Council Secretary shall compile and maintain written minutes/briefs for the following: Standing Committees, Special Committees, Select Committees, Sub-Committees, Regular Council Meetings, Task Forces, Workshops of the Council as a Whole, Meetings of the Council as a Whole, and Shade Meetings.

The personnel employed by the Director/Council Secretary are responsible for the scheduling, noticing, agendas, and minutes for all meetings of the Council, Standing Committees, Task Forces, Workshops of the Council as a Whole, and Shade Meetings.

##### **MEMBER TO MEMBER MEETINGS**

The Executive Council Assistant (ECA) is responsible for scheduling, noticing, posting, taping (taping is not required, but recommended), and preparing written briefs/minutes, including a sign-in sheet, for all meetings between and amongst individual Council Members. If recording is required, please fill out the Assessment Checklist and send to Administrative Services.

##### **SUBCOMMITTEES OR SPECIAL COMMITTEES**

ECAs will be assigned to staff Subcommittees or Special Committees to which their Council Member has been appointed to Chair by the Council President. The Legislative Assistant – Legislative Services Division will send out the notice of Subcommittee or Special Meetings, record the meeting if necessary, and create the sign-in sheets. The ECA should coordinate with the assigned Legislative Assistant.

All minutes are the responsibility of the Research Division. All documents for these meetings will be filed with the Legislative Services Division immediately upon the adjournment of the meeting. The minutes will follow within 72 hours of the meeting. The Director/Council Secretary's Office along with the Chief of Legislative Services will work with the ECA of the Council Member appointed as Chairperson for all Select/Special Committees and Subcommittees, to ensure that the ECA posts and schedules meetings in compliance with the processes and procedures used within the Legislative Services Division—this will reinforce the Records and Retention Procedures of the Office of City Council as directed by the Director/Council Secretary.

Please note, it is the responsibility of the ECA to comply with the requirements as stated and printed. A review of the Public Notice/Information System is completed and reported on as to Compliance with the Code.

## **MEETINGS BETWEEN COUNCIL MEMBERS SERVING ON OTHER BOARDS & COMMISSIONS**

In addition to the Standing Committees, Council Members may serve on various boards and commissions. Meetings between and amongst members of boards and commissions must also be noticed. The ECA is responsible for the noticing and minutes, including a sign-in sheet, of any meeting between their Council Member and the member of a board or commission where both simultaneously serve. Please note that anytime a meeting notice document is distributed via email to [CityC@coj.net](mailto:CityC@coj.net), the Public Notice/Information System is considered activated and the ECA (or assigned staff member as appropriate) is responsible to complete every step of the process.

## **TOWN MEETINGS & COMMUNITY EVENTS**

Upon request of the initiating Council Member, “Town Meeting” and “Community Event” notifications may be posted to the Council Web Calendar, even though these events are not necessarily posted to the Public Notice Web Application. Please note that if the event flyer (or other event document) is email distributed to [CityC@coj.net](mailto:CityC@coj.net), the Public Notice/Information System is considered activated and the ECA is now responsible to complete every step of the process, including the preparation of minutes, any amendments or cancelations, and posting an official notice of the meeting.

If the initiating Council Member does not intend to invite other Council Members to a “Town Meeting” or “Community Event”, then clearly indicate this is “Not a noticed meeting” below the meeting title when emailing to the [CityC@coj.net](mailto:CityC@coj.net) email account.

A checklist of items that may be needed during a Town Meeting or Community event is included in this manual as well as a Meeting Assessment Checklist.

## **REQUIREMENTS, NAMING STRUCTURE & RECORDS MANAGMENT**

All public notice communication must be on a letterhead from the initiator and, in addition to the current date and time the notification is sent to [CityC@coj.net](mailto:CityC@coj.net), the notice must contain the name and contact information of the ECA (or staff member or division) posting the notification. The CC line on the notice should remain the same. However, if necessary, names may be added to the list, but none should be removed from the original template. The date and place of event as well as the type of document (i.e. Notice, Amended Notice, Agenda) should be in bold font for increased visibility.

All appropriate meeting documentation, i.e. notices, amendments, agendas, cancellations, briefs/minutes, sign-in sheets, etc., is electronically distributed via email attachment to [CityC@coj.net](mailto:CityC@coj.net) for appropriate posting. Please see below for a sample email for a notice

Additionally, records management is important for retrieval of documents in a systematic process. Thus, the naming structure of documents are extremely important. The naming of the document will have the date in YYYYMMDD format followed by the type of document and the subject. Please note that your subject line must match your Notice file name and all files must be separate and must be in PDF (see examples below):


## Naming Examples

- 20500820 Notice Meeting CM Brown Meeting re Public Places
- 20500820 Attendance Sheet CM Brown Meeting re Public Places
- 20500820 Amended Attendance Sheet CM Brown Meeting re Public Places
- 20200820 Minutes CM Brown Meeting re Public Places
- 20500820 PowerPoint CM Brown Meeting re Public Places

Due to the naming structure, if a date change is needed, it will be beneficial to issue a cancelation notice and send a new meeting notice with the correct date.

All documents received must be forwarded to the Legislative Services Division via hard copy, originals and matching documents. Additionally, all documents must be scanned and transmitted electronically using the ScanSnap equipment provided to each ECA. The ECA will scan all documents and forward the properly labeled document as a file attachment.

## **SAMPLE EMAIL TEMPLATES**

Send	To	<a href="#">CITYC</a>
	Cc	
Subject		220609 Noticed Meeting CM Name and Subject
 20220609 Noticed Meeting CM Name and Subject.pdf 224 KB		
Good morning, Please see the attached meeting Notice. Sincerely,		
<b>Kristen Bloss</b> Administrative Assistant to the Director Jacksonville City Council 117 W. Duval Street, Suite 425 Jacksonville, FL 32202 Telephone: (904) 255-5141 Email: <a href="mailto:kbloss@coj.net">kbloss@coj.net</a>		

Send

To [@CITYC](#)

Cc

Subject 220609 Noticed Meeting CM Name and Subject

20220609 Amended Noticed Meeting CM Name and Subject.pdf  
224 KB

Good afternoon,  
Please see the attached amended meeting Notice. The Notice has been amended for the new meeting time of 6:00 P.M. on Thursday, June 9, 2022, in Conference Room B.  
Sincerely,

**Kristen Bloss**  
Administrative Assistant to the Director  
Jacksonville City Council  
117 W. Duval Street, Suite 425  
Jacksonville, FL 32202  
Telephone: (904) 255-5141  
Email: [kbloss@ccj.net](mailto:kbloss@ccj.net)

## SAMPLE TEMPLATES – NOTICES & EXCUSALS

Sample notice and excusal templates are available in the following directory: G:\Shared\Sample - Council Public Notices\2022. Document samples are located in this directory for your convenience. Excusals can be used for specific meetings, a period of time/days. An excusal for an entire day or multiple days is sufficient to cover the meetings for that time period (i.e. there is no need to complete excusals for each meeting during that time period).

## SAMPLE 1 – Notice-Two Elected Officials



### OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

### NOTICE

Notice is hereby given that Counsel Member one will meet with Council Member two on **Thursday, June 9, 2022, 6:00 P.M. in Conference Room B, located at 117 West Duval Street, Suite 425, City Hall St. James Building, Jacksonville, FL 32202.** The purpose of the meeting is to discuss public transportation in Murray Hill with neighbors, Jacksonville Transportation Authority, and the Murray Hill Preservation Association. This meeting is open to the public.

For general meeting information or questions please contact CM ECA Name at [CMECAName@coj.net](mailto:CMECAName@coj.net)

#### **Accommodation Request:**

Pursuant to the American with Disabilities Act, accommodations for persons with disabilities are available upon request. Please allow 1-2 business days' notification to process; last minute requests will be accepted, but may not be possible to fulfill. Please contact Disabled Services Division at: VM (904) 255-5466, TTY (904) 255-5475, or email your request to [KaraT@coj.net](mailto:KaraT@coj.net).

CM/~~eca~~.

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

#### cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division  
[CITYC@COJ.NET](mailto:CITYC@COJ.NET)  
Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page  
Media Box  
File Copy

## SAMPLE 2 – Amended Notice-Two Elected Officials



### OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

### AMENDED NOTICE

Notice is hereby given that the notice is hereby **amended for the new meeting time of Thursday, June 9, 2022, 6:00 P.M. in Conference Room B, located at 117 West Duval Street, Suite 425, City Hall St. James Building, Jacksonville, FL 32202** initiated by Honorable Council Member one, with Council member two in attendance. The original meeting time was Thursday, June 9, 2022, 6:00 P.M. at Edgewood Avenue Christian Church, 1041 Edgewood Ave S, Jacksonville, FL 32205. The purpose of the meeting is to discuss public transportation in Murray Hill with neighbors, Jacksonville Transportation Authority, and the Murray Hill Preservation Association. This meeting is open to the public.

For general meeting information or questions please contact CM ECA Name at [CMECAName@coj.net](mailto:CMECAName@coj.net)

#### Accommodation Request:

Pursuant to the American with Disabilities Act, accommodations for persons with disabilities are available upon request. Please allow 1-2 business days' notification to process; last minute requests will be accepted, but may not be possible to fulfill. Please contact Disabled Services Division at: VM (904) 255-5466, TTY (904) 255-5475, or email your request to [KaraT@coj.net](mailto:KaraT@coj.net)

CM/~~eca~~

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

#### cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division  
[CITYC@COJ.NET](mailto:CITYC@COJ.NET)  
Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page  
Media Box  
File Copy



## SAMPLE 3 – Cancellation Notice



### OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

### CANCELLATION NOTICE

Notice is hereby given that the Honorable Council Member, District XX Council Member, will **not** be holding a Town Hall for **Thursday, June 9, 2022, 6:00 P.M. at Edgewood Avenue Christian Church, 1041 Edgewood Ave S, Jacksonville, FL 32205**. The purpose of the meeting was to discuss public transportation in Murray Hill with neighbors, Jacksonville Transportation Authority, and the Murray Hill Preservation Association.

For general meeting information or questions please contact CM ECA Name at [CMECAName@coj.net](mailto:CMECAName@coj.net)

#### Accommodation Request:

Pursuant to the American with Disabilities Act, accommodations for persons with disabilities are available upon request. Please allow 1-2 business days' notification to process; last minute requests will be accepted but may not be possible to fulfill. Please contact Disabled Services Division at: VM (904) 255-5466, TTY (904) 255-5475, or email your request to [KaraT@coj.net](mailto:KaraT@coj.net)

CM/[eca](mailto:eca)

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division  
[CITYC@COJ.NET](mailto:CITYC@COJ.NET)  
Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page  
Media Box  
File Copy

## SAMPLE 4 – Meeting Notice-Two Members Regarding Legislation



### OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

### NOTICE

Notice is hereby given that Council President Charlie Brown will meet with Council Member Minnie Mouse and representatives from the Office of General Counsel on **Friday, June 14, 2019, at 1:00 p.m. in Conference Room B, located at 117 West Duval Street, Suite 425, City Hall St. James Building.** The purpose of this meeting is to discuss pending legislation 2019-226 and 2019-227:

**2019-226:** ORD Adopting Large Scale FLUM Amend to 2030 Comp Plan at 0 A.C. Skinner Pkwy btwn I-95 & Southside Blvd (17.37± Acres) - CGC to HDR - JTA. (Appl# L-5309-18A) (Dist 11-Becton) (Fogarty) (LUZ) (Rezoning 2019-227) LUZ PH - 5/21/19 Public Hearing Pursuant to Sec 163.3184(3), F.S. & Chapt 650, Pt 4, Ord Code - 5/15/19 & 5/28/19

**2019-227:** ORD-Q Rezoning at 0 A.C. Skinner Pkwy (17.37± Acres) btwn I-95 & Southside Blvd - PUD to PUD - JTA. (Dist 11-Becton) (Corrigan) (LUZ) (Large Scale 2019-226) LUZ PH - 5/21/19 Public Hearing Pursuant to Chapt 166, F.S. & CR 3.601 - 5/15/19 & 5/28/19

All interested parties are encouraged to attend.

For additional information or questions please contact CMECA Name at [CMECAName@coj.net](mailto:CMECAName@coj.net)

#### **Accommodation Request:**

Pursuant to the American with Disabilities Act, accommodations for persons with disabilities are available upon request. Please allow 1-2 business days' notification to process; last minute requests will be accepted, but may not be possible to fulfill. Please contact Disabled Services Division at: VM (904) 255-5466, TTY (904) 255-5475, or email your request to [KaraT@coj.net](mailto:KaraT@coj.net)

RD/bd

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division

# SAMPLE 5 – Excusal-All Council Related Business



## OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

## NOTICE

### MEMORANDUM

TO: The Honorable Charlie Brown  
Council President

FROM: The Honorable Minnie Mouse  
Council Member, District 20

SUBJECT: Excused Absence Request – All City Council Business

---

I respectfully request to be excused from all City Council related business scheduled for August 21 – 26, 2019, as I will be attending the International Trade Conference in Tune Town, USA. I will return to Jacksonville, FL on Tuesday, August 27, 2019, and will attend the scheduled City Council meeting.

Thank you for your consideration of this request.

Please contact Buzz Lightyear, ECA-District 31, at (904) 255-1234 for additional information or correspondence.

CM/eca

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahneur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division

[CITYC@COJ.NET](mailto:CITYC@COJ.NET)

Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page

## SAMPLE 6 – Excused Absence-Standing Committee

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### OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

### NOTICE

#### MEMORANDUM

TO: The Honorable Charlie Brown  
Council President

FROM: The Honorable Minnie Mouse  
Council Member, District 20

SUBJECT: Excused Absence Request – Recreation & Community Development Committee

---

I respectfully request to be excused from attending the Recreation & Community Development Committee meeting, scheduled for Monday, August 2, 2010, as I will be out of town on family vacation.

Thank you for consideration of my request.

Please contact Princess Brown, ECA-District 42, at (904) 255-1234 for additional information or correspondence.

CM/eca

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

cc: Council Members and Staff

Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division

[CITYC@COJ.NET](mailto:CITYC@COJ.NET)

Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page

# SAMPLE 7 – Excused Lateness Request-Standing Committee



## OFFICE OF THE CITY COUNCIL

CM NAME  
COUNCIL MEMBER, DISTRICT XX  
PHONE (904) 255-XXXX  
FAX (904) 255-XXXX  
EMAIL: [CMNAME@COJ.NET](mailto:CMNAME@COJ.NET)

117 WEST DUVAL STREET, SUITE 425  
4TH FLOOR, CITY HALL  
JACKSONVILLE, FLORIDA 32202

## NOTICE

### MEMORANDUM

TO: The Honorable Charlie Brown  
Rules Committee Chair

FROM: The Honorable Minnie Mouse  
Council Member, District 20

SUBJECT: Request for Excused Lateness – Rules Committee

---

I respectfully request to be excused from arriving late for the Rules Committee meeting scheduled for August 21, 2019, as I have a prior commitment and may be running late.

Thank you for your consideration of this request.

Please contact Buzz Lightyear, ECA-District 31, at (904) 255-1234 for additional information or correspondence.

CM/[eca](#)

NOTICED ON: May 26, 2022, at 1:00 p.m., pursuant to 15.103(c), *Ordinance Code*.

cc: Council Members and Staff  
Margaret "Peggy" Sidman, Director/Council Secretary  
Merriane Lahmeur, Chief, Legislative Services Division  
Yvonne Mitchell, Chief, Administrative Services Division  
Jeff Clements, Chief, Research Division  
[CITYC@COJ.NET](mailto:CITYC@COJ.NET)  
Electronic Notice Kiosk – 1<sup>st</sup> Floor City Hall  
Public Notice System – City Council Web Page  
Media Box  
File Copy

# Community Meeting/Town Hall Checklist

## Community Meeting/Town Hall Checklist

Title: \_\_\_\_\_

Bill #: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

- Secure date, time, location, keys (if applicable)
- Secure presenters and COJ staff (Legislative Services, Research, etc.) (if applicable)
- Send "Meeting Technology and Security Resource Assessment Checklist" to the Chief of Administrative Offices
- Create notice and send to City-C, constituents, presenters, CPAC, etc.
- Post on social media (Facebook, Nextdoor, etc.)
- Create and copy agenda
- Create and copy comment cards
- Create and copy sign-in sheet
- Create and copy speaking points for Council Member
- Create and copy handouts
- Make a supply box to take to the meeting site
- Take yard signs for posting at meeting site and collect at conclusion of meeting
- Confirm with all presenters day before event
- Get cell phone numbers for all those involved
- Prepare room with seating, easels, sign-in table, etc.
- Identify emergency exits and bathrooms and share with attendees
- Video meeting for minutes (if applicable)
- Take notes and prepare minutes
- Print JSO Officer sign-in sheet and get signatures/badge numbers immediately following meeting; return to Ken Browning and Sharyn Nelson
- Email minutes, handouts, comment cards, etc. to City-C and give originals to Legislative Services
- Follow-up on any requests as a result of the meeting
- Request deferrals of bills if necessary
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Assessment Checklist



## OFFICE OF THE CITY COUNCIL

### MEETING TECHNOLOGY AND SECURITY RESOURCE ASSESSMENT CHECKLIST

Complete this form for technology and/or security needs for all meetings (in-house or offsite).

Submit form to [ymitch@coj.net](mailto:ymitch@coj.net) at the earliest but no later than 48 hours prior to the event.

*NOTE: No resources available during 5<sup>th</sup> Week, Summer Break, or Winter Break*

Council Member: \_\_\_\_\_

Requestor Person: \_\_\_\_\_ Today's Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Meeting Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Meeting Start Time: \_\_\_\_\_ Meeting End Time: \_\_\_\_\_

Meeting Title: \_\_\_\_\_

Meeting Location: \_\_\_\_\_

Offsite Contact Person: \_\_\_\_\_

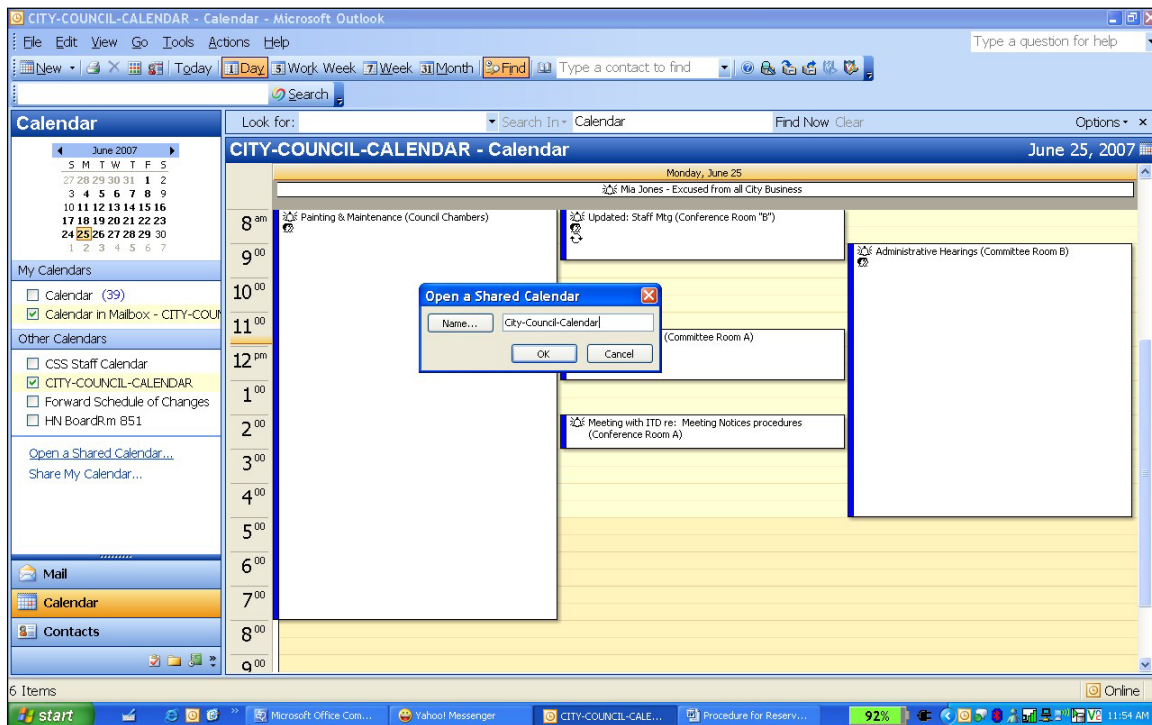
Offsite Contact Number: \_\_\_\_\_

COUNCIL MEMBER REQUESTS:	YES	NO	DETAILS
Recording (Audio)			
Recording (Video)			
Streaming (Lynwood Roberts/Chambers/Remote)			
Presentations (ppt, pictures, etc.)			
Zoom			
<b>FACILITY CAPABILITIES: (Offsite Meetings)</b>			
WiFi Access			
Audio/Visual Access			
Transportation Authorized (Equipment Move/Fleet Charge)			NOTE: CM Account Charged
<b>SECURITY (JSO) ASSESSMENT:</b>			
Expected Number of Attendees			
Expected City Officials			
Community Engagement Level			

## Council Calendar - Reserving City Council Meeting Rooms

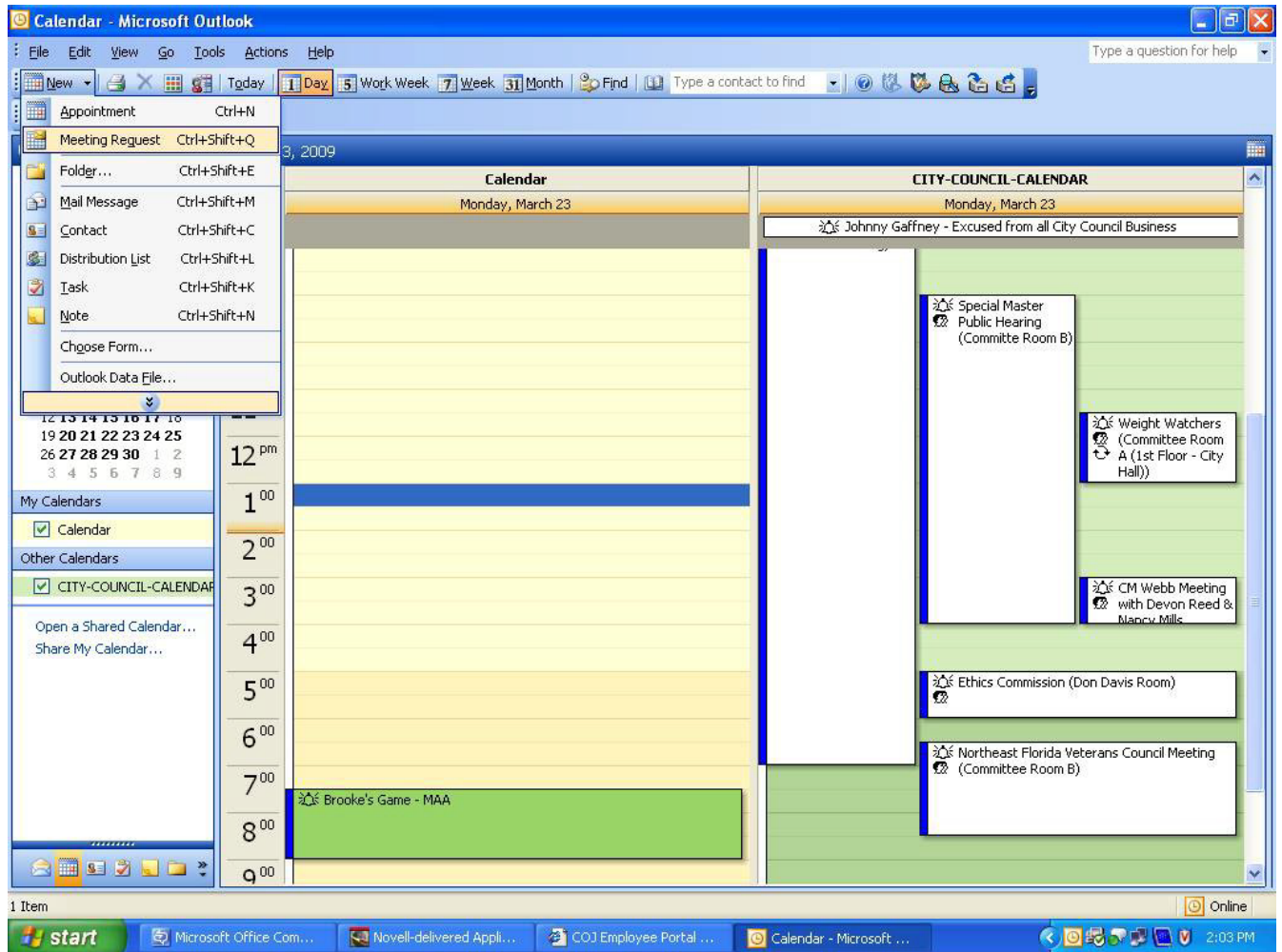
Before scheduling any City Council Resources, please be sure to check availability on the City Council Calendar. All resources and schedules are listed.

- 1) Select **CALENDAR** on left pane of Outlook.
- 2) Select **“Open a Shared Calendar”** and enter **“City-Council-Calendar”** (including dashes) and select OK. This will open the City Council Calendar. From this point forward, the City Council Calendar will be listed on the left pane under **“Other Calendars”** so you can select it again by checking the relative box.



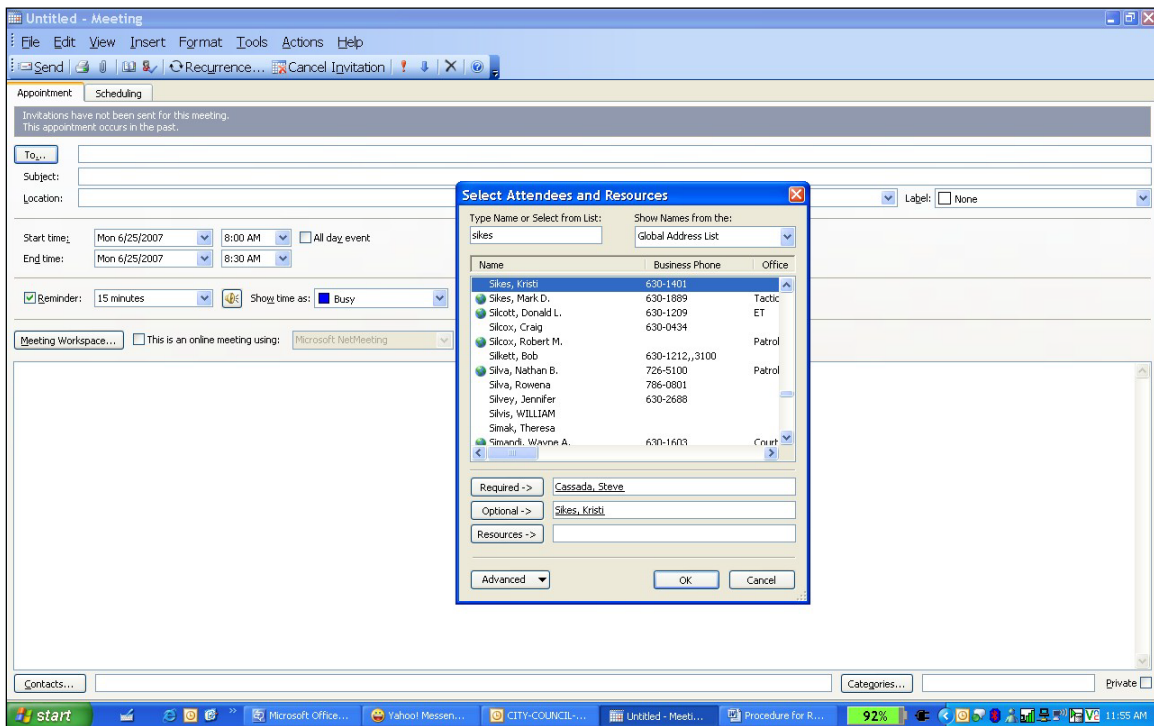


- 3) If the calendar date and time is available, highlight YOUR calendar.
- 4) Select the down arrow beside **NEW** and select **“MEETING REQUEST”**.  
NOTE: If you receive a message that you do not have sufficient permissions, please ensure that you are sending the request from your email. To do this, make sure YOUR calendar is highlighted.



- 5) Select the **TO** and type **CITY-COUNCIL-CALENDAR** as well as any other specific names in the attendees, placing them in either the **Required**, or **Optional** line then **OK**.

NOTE: When reserving the Lynwood Roberts Room, type both **CITY-COUNCIL-CALENDAR** and **SJCR-1<sup>ST</sup>-LYNWOOD ROBERTS ROOM** as attendees.



- 6) Make sure to enter the **SUBJECT** and **LOCATION** dialog boxes. Council Members Names are required in this location and if the – Noticed or Non-Noticed Meeting must be inserted in the Subject Box. The Location box must include the building address including the floor and Suite number.
- 7) Select the **Start** and **End time**.
- 8) Give as much contact information (mandatory) in the larger dialog box as possible. The Executive Council Assistant's names, email, address and contact number must be included in this box.
- 9) Select **SEND**.
- 10) You will receive a confirmation that your meeting has been scheduled. If you have not complied with the process above your request will be declined with an explanation requesting compliance for posting. Please resend information with necessary changes and your meeting request will be confirmed.

## **Visitor & Guest Procedures**

To maintain a safe, and secure environment for employees, the following visitor and guest procedures shall be followed.

- No unauthorized person shall be permitted into the restricted access areas of the City Council.
- All City Employees shall visibly display their City Issued ID Badge at all times while in the restricted access areas of the City Council, (Employee Services Directive 0515, Identification Badge Policy).
- All City Employees that are NOT City Council Employees shall check in with the Receptionist and state your purpose for access into the City Council restricted areas.
- All visitors and guests (non-City Employees) shall sign in with the City Council Receptionist located in the lobby at Suite 425.
- The Receptionist will notify the host staff member of their visitor/guest that they are in the lobby. The host staff member will respond to the lobby and take responsibility of the visitor/guest.
- All visitors/guest shall remain under escort supervision of the host staff member while within the restricted access areas of the City Council Suites. The host staff member shall remain with the visitors/guest until their departure from these areas.
- If a visitor is seeing two Council Members consecutively, the visitor must either be escorted to the lobby at Suite 425 between meetings or can be brought by the host staff member to the next hosting staff member who will then accompany the visitor through the City Council restricted access area until their departure.

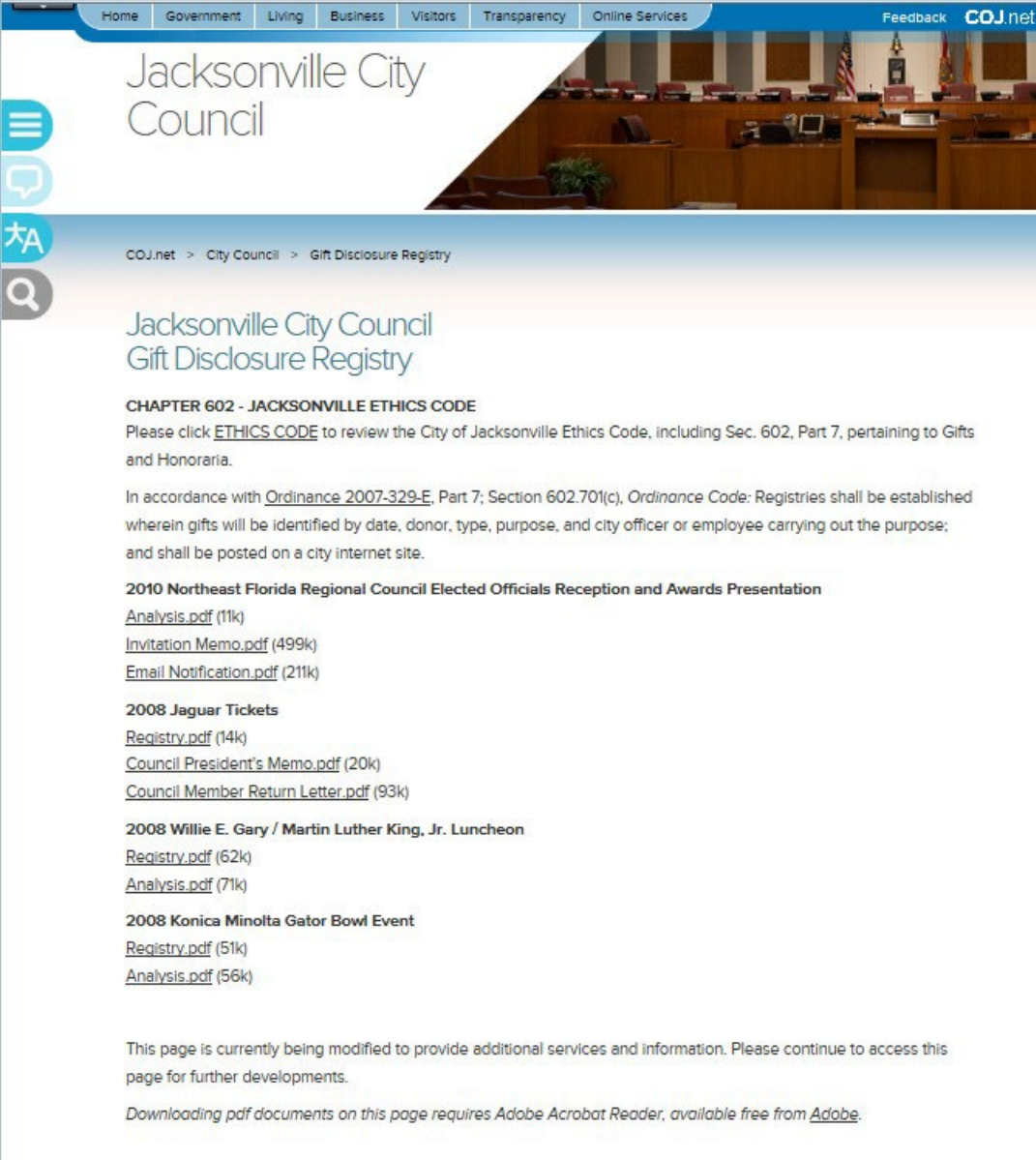
The Chief of Administrative Services and the Director of City Council shall be notified for any request by the Media to gain access into the City Council restricted access areas. If approved, the Media Representative shall be escorted and supervised in the same manner as a visitor/guest.

Any questions regarding these procedures contact the Chief of Administrative Services.

## V. COMPLIANCE

### GIFT DISCLOSURE – Web Posting

In accordance with Chapter 602, *Jacksonville Municipal Code*, registries shall be established wherein gifts will be identified by date, donor, type, purpose, and city officer or employee carrying out the purpose; and shall be posted on a city internet site and shall be posted on a City or independent agency internet site within 45 days of receipt of the gift. Gift Disclosure form 9 is due by the ECA on the last month of the following quarter (i.e. the Form 9 for January-March is due in June) and the Office account information is due on the 10<sup>th</sup> day of the month following that quarter (January-March is due by April 10<sup>th</sup>). The Jacksonville City Council Gift Disclosure Registry may be accessed at <http://www.coj.net/City-Council/Gift-Disclosure-Registry.aspx> as shown below:



The screenshot shows the Jacksonville City Council website's Gift Disclosure Registry page. The page features a blue navigation bar at the top with links for Home, Government, Living, Business, Visitors, Transparency, and Online Services. The main header includes the Jacksonville City Council logo and a background image of the council chamber. The page content is organized into sections with headings and lists of PDF documents. A notice at the bottom indicates that the page is being modified and provides information about downloading PDFs.

Home Government Living Business Visitors Transparency Online Services Feedback COJ.net

# Jacksonville City Council

COJ.net > City Council > Gift Disclosure Registry

## Jacksonville City Council Gift Disclosure Registry

**CHAPTER 602 - JACKSONVILLE ETHICS CODE**  
Please click [ETHICS CODE](#) to review the City of Jacksonville Ethics Code, including Sec. 602, Part 7, pertaining to Gifts and Honoraria.

In accordance with [Ordinance 2007-329-E](#), Part 7; Section 602.701(c), *Ordinance Code*: Registries shall be established wherein gifts will be identified by date, donor, type, purpose, and city officer or employee carrying out the purpose; and shall be posted on a city internet site.

**2010 Northeast Florida Regional Council Elected Officials Reception and Awards Presentation**  
[Analysis.pdf](#) (11k)  
[Invitation Memo.pdf](#) (499k)  
[Email Notification.pdf](#) (211k)

**2008 Jaguar Tickets**  
[Registry.pdf](#) (14k)  
[Council President's Memo.pdf](#) (20k)  
[Council Member Return Letter.pdf](#) (93k)

**2008 Willie E. Gary / Martin Luther King, Jr. Luncheon**  
[Registry.pdf](#) (62k)  
[Analysis.pdf](#) (71k)

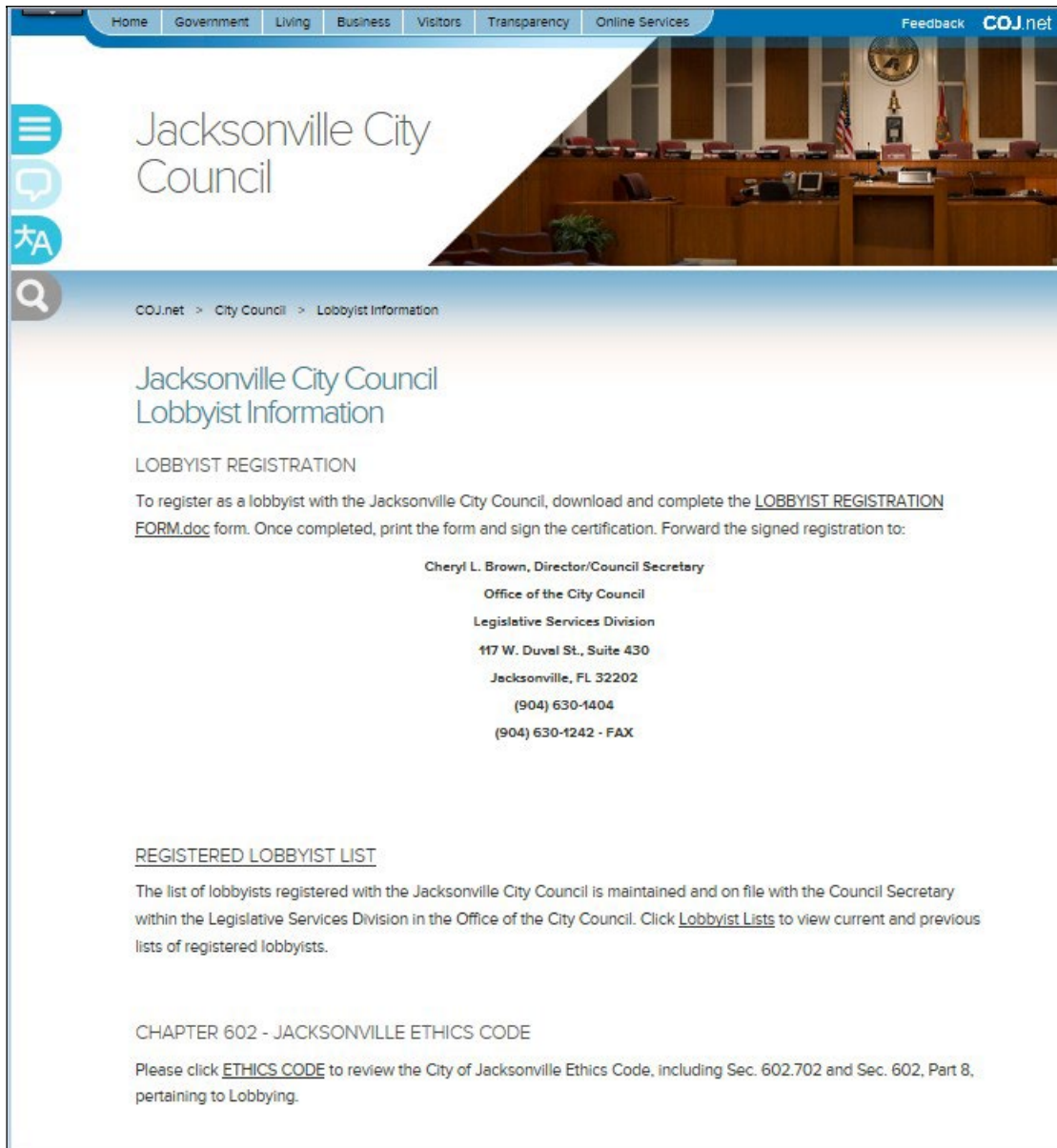
**2008 Konica Minolta Gator Bowl Event**  
[Registry.pdf](#) (51k)  
[Analysis.pdf](#) (56k)

This page is currently being modified to provide additional services and information. Please continue to access this page for further developments.

Downloading pdf documents on this page requires Adobe Acrobat Reader, available free from [Adobe](#).

## LOBBYIST LIST – Web Posting

In accordance with Chapter 602, *Jacksonville Municipal Code* (as amended by Ord. 2007-329-E, § 3; Ord. 2008-470-E, § 2), the Director/Council Secretary shall maintain a book of registration statements and oaths submitted by lobbyists, as well as any correction and amendments made to this statements. Lobbyist lists and information is available online at <http://www.coj.net/City-Council/Lobbyist-Information.aspx> as shown below:



The screenshot shows the Jacksonville City Council website's "Lobbyist Information" page. The page features a blue header with navigation links: Home, Government, Living, Business, Visitors, Transparency, Online Services, Feedback, and COJ.net. The main content area is white with a blue sidebar on the left containing icons for a menu, chat, accessibility, and search. The page title is "Jacksonville City Council Lobbyist Information". Below the title, there is a breadcrumb trail: "COJ.net > City Council > Lobbyist Information". The main heading is "Jacksonville City Council Lobbyist Information". Underneath, the section "LOBBYIST REGISTRATION" is followed by a paragraph: "To register as a lobbyist with the Jacksonville City Council, download and complete the [LOBBYIST REGISTRATION FORM.doc](#) form. Once completed, print the form and sign the certification. Forward the signed registration to:". This is followed by the contact information for Cheryl L. Brown, Director/Council Secretary, including her office address (117 W. Duval St., Suite 430, Jacksonville, FL 32202) and phone/fax numbers ((904) 630-1404 and (904) 630-1242). The next section is "REGISTERED LOBBYIST LIST", which states that the list is maintained on file with the Council Secretary and provides a link to "Lobbyist Lists". The final section is "CHAPTER 602 - JACKSONVILLE ETHICS CODE", which includes a link to "ETHICS CODE" for review.

## SECONDARY EMPLOYMENT - Disclosure

In accordance with Chapter 602, *Jacksonville Municipal Code* (as amended by Ord. 2007-329-E, § 3; Ord. 2008-470-E, § 2), all employees of the City must disclose secondary employment. Employees must obtain prior approval before taking secondary employment and once approval for secondary employment has been received, the employee must register that employment. Human Resources Directive #519 (dated May 07, 2018), regarding Secondary Employment, is available on the COJ Portal at <http://www.coj.net/departments/ethics-office/secondary-employment.aspx>. Highlights of the policy are shown below and on the following pages.

### PURPOSE/OBJECTIVES

The purpose of this policy is to provide guidance in assisting City employees in meeting their obligations and responsibilities under the City's secondary employment requirements of the Jacksonville Ethics Code. The Ethics Code provision on secondary employment, Section 602.403, can be reviewed at <http://www.coj.net/Departments/Ethics+Office/Ethics+Code+.htm>. Employee Services, the Ethics Office and the Departmental Ethics Officers (DEO) will assist in identifying conflicts of interest that may arise by engaging in secondary employment. Employee Services will serve as the main contact for secondary employment and the required forms. This Secondary Employment policy supplements the law and addresses:

- Employees appointed by the Mayor seeking approval to undertake secondary employment.
- Employees appointed by a Constitutional Officer or City Council President seeking approval to undertake secondary employment.
- Notification of secondary employment by all other full time employees.

Employees of the Jacksonville Sheriff's Office (JSO) are excluded from this policy and are governed by JSO Secondary Employment policy as determined by the Ethics Director.

A list of DEOs may be reviewed at <http://www.coj.net/Departments/Ethics+Office/Ethics+Officers+.htm>.

### DEFINITIONS

#### **Secondary Employment**

Secondary employment refers to a second job held by a full-time City of Jacksonville employee. This secondary employment includes contract, self-employment and part time work as well as any employment for another person or organization for any period of time while employed by the City of Jacksonville.

Secondary employment includes:

- operating a business.
- providing paid consultancy services to another person or organization.
- partnerships and directorships of companies; (Note: any position that involves being engaged in the business of the company in an employee's spare time).
- paid work outside; and/or,
- voluntary employment in return for a benefit.
- employment undertaken while on approved leave (either paid or unpaid).
- employment that generates any taxable income on a W-2 form or a 1099 form, and work that an employee is doing that is not currently generating income (example: a business the employee is

"getting off the ground" or one in which the employee's spouse is receiving the salary and the employee is not generating income.) Any outside work is covered.

If in doubt, declare it or discuss it with your DEO. Military duties are not considered to be secondary employment.

**Conflict of Interest** - exists when the outside employment could reasonably be expected to impair independence in judgment or performance of a City employee's duties. Some examples of conflicts occur when:

- the company the employee works for has any business dealings with the City of Jacksonville.
- secondary employment is undertaken during the same hours that an employee is being paid as a City employee, if not on approved leave.
- secondary employment makes use of any City of Jacksonville facility, equipment or resource including but not limited to telephone, computer software and information technology resources and fleet vehicles.
- secondary employment makes use of or may commercially benefit from information the employee possesses by virtue of their employment with the City of Jacksonville.
- COJ employees are required to provide verification of any approved secondary employment to any COJ agency when providing vendor services directly to COJ.

#### **SECONDARY EMPLOYMENT POLICY STATEMENT**

An employee must not engage in private employment or contract work outside the service of the City of Jacksonville that could reasonably be expected to impair independence in judgment or performance of City duties.

Employment with the City of Jacksonville carries with it an obligation to act in the public interest. Accordingly, employees must abide by the standards provided in the Ethics Code, obey the law and consider the spirit of the law.

An employee must not engage in secondary employment outside the services of the City if prohibited from doing so by the appropriate approving authority or unless the employee has agreed in writing to any of the terms and/or conditions placed on the secondary employment by the appropriate approving authority.

#### **APPLICABILITY**

This policy applies to all full-time employees as described below:

##### **A. Appointed Officials and Appointed Employees Reporting to the Mayor**

Appointed officials and appointed employees are responsible for reporting proposed secondary employment falling within the scope of this policy. Such employment must be approved and the secondary employment must not commence prior to the Mayor's designee's approval. All secondary employment of appointed officials and employees is posted on the City's website. This is required by the Ethics Code.

##### **B. Appointed Officials and Employees Reporting to the City Council**

All employees appointed by the City Council, while full-time employees of the Council, must obtain prior approval from the Council President/Designee before accepting secondary employment.

##### **C. Elected Constitutional Officials and their Employees**

All employees appointed by a Constitutional Officer, while full-time employees of the

Constitutional Office, must obtain prior approval from the Constitutional Officer /designee before accepting secondary employment.

**D. All other full-time City employees**

All other employees must provide notification of secondary employment, by completing the attached form within ten days of commencing secondary employment. The review of conflict of interest standards by the employee's department official (department head or DEO) may result in notification to terminate the secondary employment relationship.

- E. New employees with the City of Jacksonville** will receive a copy of the Secondary Employment Policy during their on-boarding session. At this time they will acknowledge receipt of the Secondary Employment Policy by signing the Policy Acknowledgment and Loyalty Statement. Any updates to the Secondary Employment Policy will be sent to each department, with an acknowledgment form, to distribute to all employees. The departments will send all signed acknowledgment forms back to Employee Services.

**ANNUAL RENEWAL**

On an annual basis, by March 31st of each year, all employees with approved Secondary Employment will be required to verify their information with Employee Services. Employees must send an email to [secondaryemployment@coj.net](mailto:secondaryemployment@coj.net) stating there has been no change and they request their approval be extended for another year or follow the directions below to update their request.

Any failure to follow this renewal process by the deadline will result in the immediate termination of the employee's Secondary Employment authorization.

**PROCEDURE FOR APPOINTED OFFICIALS AND EMPLOYEES**

1. Requests to engage in secondary employment shall be submitted using the attached form. The employee shall submit the form with the required information to his/her DEO with a copy to the direct supervisor for approval prior to commencing secondary employment.
2. The DEO will conduct the initial review of the secondary employment for any potential conflict issues, conferring with the Ethics Officer and General Counsel's office as necessary.
3. The DEO will then forward the recommendation to the Director/Chief for departmental recommendation.
4. The department recommendation shall be submitted, within five (5) days of receipt, to the Director of Employee Services /designee or appropriate appointing authority for approval.
5. The Employee Services recommendation shall be submitted to the Mayor's designee for final approval.
7. The employee shall be notified of the recommendation of approval or denial. A copy of the request/notification form shall be placed in the employee's personnel file.
8. After receipt of this approval, Employee Services will update the master list of Appointed City employees engaged in secondary employment for publication to the [coj.net](http://www.coj.net) website and the Employee Portal.

Effective January 1, 2008, the secondary employment of appointed employees, including projected hours per year, is published online at: <http://www.coj.net/Departments/Ethics-Office/Disclosures.aspx>.



## RECORDS RETENTION GUIDELINES

Records must be retained in accordance with GS1-SL. Removing inactive files throughout the year will help maintain an organized system. Office moves traditionally happen during the change in Council Leadership and files may also be organized and stored during this time.



### OFFICE OF THE CITY COUNCIL

**MARGARET M. "PEGGY" SIDMAN**  
Director/Council Secretary  
Office (904) 255-5133  
Fax (904) 255-5230  
E-Mail: SIDMANP@COJ.NET

117 West Duval Street  
City Hall, Suite 425  
Jacksonville, FL 32202

June 9, 2022

#### MEMORANDUM

**TO:** Council Staff  
Executive Council Assistants

**FROM:** Margaret Sidman, Director  
Jacksonville City Council

**RE:** Records Management and Retention – Guidelines for Storage & Disposal of Files, Etc.

Please see the attached guidelines for destruction and retention of all routine correspondence and permanent record-keeping procedures. This information will be helpful while boxing and storing materials for Members of Council, revealing what is to be kept as required by the State Retention Schedule. These guidelines will provide information to help determine what materials should be transferred to the Legislative Services Division for permanent record storage.

The annual transfer of materials to the Records Management Central Storage facility will enhance your space allocation within your office, as well as remove inactive files. Boxes will be delivered to your area and your Council Members Office upon request. Sirretta Williams will be available to provide assistance on the proper way to box items for records you wish to send to Central Storage. Please remember that Legislative Services will not accept boxes for Records Retention that are not indexed and marked correctly for storage. Barbara Ireland Hobson will provide the clearance for submittal to Merriane Lahmeur (or her designee) for final bar code and storage.

Records Management and Retention, and proper storage are a critical part of the process. Removing inactive files several times throughout the year will help you to maintain a structured document system. As a reminder, ECAs are responsible for transmitting all records for themselves, as well as their Council Member's Office. The Council staff will be responsible for their personal offices, departmental, and division documents.

**CC:** File Copy  
Merriane Lahmeur, Chief of Legislative Services



GS CODE \_\_\_\_\_  
Box \_\_\_\_\_ of \_\_\_\_\_

**Records and Retention  
Office of the City Council  
This Box Contains the Following Items for**

**Council Member \_\_\_\_\_**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_

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**This list was prepared by the undersigned Executive Council Assistant**

\_\_\_\_\_ Page \_\_\_\_\_ of \_\_\_\_\_

City Council Common Public Records Categories			
Category/Type of Public Record	Item No. in GS-1-SL Schedule	Description Summary	Retention Schedule
Administrative Correspondence & Memoranda	17	General correspondence and memoranda associated with routine administrative practices or office activities. These do include memos or correspondence that creates policy or procedure.	3 fiscal years
Information Request Records	23	Correspondence and supporting documentation in answering inquiries from the public. Includes public records requests, telephone lists, meeting dates and locations	1 fiscal year
Legislation Records	119	Development or review of proposed legislation. Research materials on the legislation, staff analysis, and statistical studies, input from affected persons.	Retain until obsolete, superseded, or administrative value is lost
Travel Records	52	Copies of travel vouchers, receipts, and related records on actual cost of lodging and meal allowances and other expenses.	5 fiscal years
Postage/shipping records	133	Reports showing amount of postage used, dates used, unused balance and purpose.	3 fiscal years
Equipment/ Vehicle Usage Records	224	Use of agency equipment and vehicles, including driver, destination, fuel/service stops and total trip mileage.	1 calendar year
Operational and Statistical Report Records	124	Narrative and statistical reports of office operations made within and between departments whether periodic or on an ad-hoc basis. Not official annual reports.	Retain until obsolete, superseded, or administrative value is lost
Annual reports submitted to City Council	380	Annual reports required to be submitted by a county officer to Council related to expenses or compensations in fees	5 fiscal years
Internal Audits	73	Issued by Council Auditor's Office	5 fiscal years after audit report release date

Budget Records: Supporting Documents	88	Documents related to development, modification, or implementation of final approved budget, including working papers, staff analyses, drafts, and budget requests	3 fiscal years from the budget year the records pertain to
Calendars	89	Calendars, appointment books, planners or other records showing official daily appointments and meetings, including lists or prioritized tasks, background materials, issues for discussion and speaking points or remarks.	1 anniversary year
Financial Disclosure Statements	346	Personal financial information submitted to City of elected official of the governing body.	10 fiscal years

## TEXT MESSAGES

Messages that are public records need to be retained. Proper retention guidelines are found in Florida Statutes on public record retention and the Secretary of State, Division of Libraries and Information Services, Records Management, General Records Schedule. In order to retain text messages please follow the instructions below.

### iPhone:

1. Go to settings.
2. Scroll down to Messages and tap it.
3. Under Message History, tap Keep Messages.
4. There will be three options: 30 days, 1 year, and Forever: Select Forever.

### Android:

1. Open the Messages app.
2. Tap the More button at the top-right of the screen.
3. Select the Settings option.
4. Tap the More settings option.
5. Tap the button to the right of Delete old Messages to turn it off.

## CITY COUNCIL POSTAGE

Each District Council Member shall be allotted \$1,000 per District Council Member. The remaining \$36,000 for postage shall be distributed at the discretion of the Council President to all Council Members.

<b>REQUEST FOR MAIL PROCESSING</b>	
<b>Date:</b>	<input style="width: 100%;" type="text"/>
<b>Name:</b>	<input style="width: 100%;" type="text"/>
<b>Phone:</b>	<input style="width: 100%;" type="text"/>
<b>Department:</b>	<input style="width: 100%;" type="text"/>
<b>*Account Number:</b>	<input style="width: 100%;" type="text"/>
<b>* Mail will not be processed without an account number</b>	
<b>Letters:</b>	<input style="width: 50%;" type="text"/> <i>Number of pieces</i>
<b>Large Envelopes:</b>	<input style="width: 50%;" type="text"/> <i>Number of pieces</i>
<b>Certified/Return receipt:</b>	<input style="width: 50%;" type="text"/> <i>Number of pieces</i>
<b>Other:</b>	<input style="width: 50%;" type="text"/> <input style="width: 20%;" type="text"/> <i>Number of pieces</i>

## EX PARTE

If there has been communication with any person concerning a quasi-judicial item, that communication will need to be disclosed prior to the public hearing on the matter. The information required to fill out the form can be found by doing a bill search.

**Quasi-Judicial Ex Parte Communication  
Disclosure Guideline**

Pursuant to Florida law, certain items are deemed "quasi-judicial" in nature, as indicated on the City Council agenda with an QRD-Q, and thus certain protocols are required to be followed for those items.

- If you have had a communication with any person concerning a quasi-judicial item, you will need to disclose that communication prior to the public hearing on the matter.
- These guidelines are intended to assist you in declaring ex parte communications.

**Ordinance Number:** \_\_\_\_\_

**City Council Public Hearing Date:** \_\_\_\_\_

**LUZ or other Committee Public Hearing Date:** \_\_\_\_\_

**Type of Quasi-Judicial Bill (please circle):**

Conventional Rezoning	PUD Rezoning	Sign Waiver	Appeal
Waiver of Road Frontage	Historic Landmark Designation	Other: _____	

**I had an ex parte communication with** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**On** \_\_\_\_\_, \_\_\_\_\_, **at** \_\_\_\_\_ **(date and time)**

**At** \_\_\_\_\_ **(location)**

**We discussed the following issues:** (Please be as specific on the issues as possible. For example, "We discussed the proposed buffer, the proposed uses, the height of the building.")

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Council Member:** \_\_\_\_\_  
(Print Name) (Date)

\_\_\_\_\_  
(Signature)