



**OFFICE OF THE CITY COUNCIL
RESEARCH DIVISION**

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CITY COUNCIL ETHICS TRAINING

Meeting Minutes

**December 12, 2022
11:00 a.m.**

Location: Lynwood Roberts Room, 1st floor, City Hall

In attendance: Council Members Terrance Freeman, Rory Diamond, Matt Carlucci, Al Ferraro, Nick Howland, LeAnna Cumber, Michael Boylan, Sam Newby, Randy White, Joyce Morgan, Brenda Priestly-Jackson, Reggie Gaffney Jr., Ju’Coby Pittman

Excused: Council Member Danny Becton

Also: Kirby Oberdorfer, Paige Johnston – Ethics Office; Margaret Sidman – Council Secretary/ Director; Jeff Clements – Council Research Division; Merriane Lahmeur - Legislative Services Division

Meeting Convened: 11:02 a.m.

Kirby Oberdorfer, City Ethics Officer, convened the meeting and apologized for the lateness of the meeting notice. The State Ethics Office approved the meeting being held with less than 24 hours of advance notice since it does not appear that this training involves topics that would require the session to be noticed pursuant to state law.

State electronic financial disclosures

A recent state law change becoming effective January 1, 2023 requires electronic filing of Form 6 financial disclosures before the January 9-13, 2023 election qualifying dates for the upcoming City elections in spring 2023. Financial disclosures must be filed with the State Ethics Commission either when qualifying to run for office or by July 1 of each year. Filing by elected officials leaving office and not elected to another office must be done twice – Form 6 must be filed by July 1, 2023 covering calendar year 2022 and Form 6F must be filed, covering the period from January through June of 2023, within 60 days after leaving office on June 30th. Form 6 financial disclosures are public records. The State Ethics Commission may self-initiate an action regarding financial disclosures without a complaint being filed. Willful failure to file a required financial reporting form can lead to an official being removed from office and/or being subject to substantial financial penalties.

A video produced by the State Ethics Commission on the procedure for electronic financial reporting using the new online portal was shown. Officials must create a username and password to activate a personal user account on the system in order to make their reports. Council Member Priestly-Jackson asked if it would be possible for council members to keep their COJ emails active beyond the date they leave office for the purpose of this electronic filing. That question will be posed to the Information Technology Division by the Ethics Office.

Form 6 net worth calculation

Section A of the form requires very comprehensive and detailed information on net worth as of December 31st of the year for which the form is being filed. Part B filing for total assets over \$1,000 requires specific information on the fair market value and location of real estate and specific information on financial accounts in banks, investment companies and other financial institutions. Individual investments in 401(k) accounts must be specifically reported; assets in the Florida Retirement System are not required to be listed since the investments are not controlled by the reporting official. Certification of completion of Part F ethics training is required to be reported.

Amendments to Form 6 filings should be made as soon as the need is determined – “better late than never”.

Gift reporting

The filing deadline for Form 9 gift disclosures is March 31, 2023 for the period October through December 2022. Gifts may be reported whenever received and don't need to be held until a single quarterly report.

Meeting adjourned: 11:39 a.m.

Minutes: Jeff Clements, Council Research Division

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12.14.22 Posted 2:00 p.m.