Guidelines for Staff Reports & Presenting to City Council

A. General Guidelines for Authoring Staff Reports

1. **Content**
    - ***a.*** Length: ***Please limit the text in the report to be no more than three pages,*** *excluding* graphics or the list of acronyms. The report itself should be no more than five pages, including graphics.
    - b. Bullet points: Please use bullet points wherever appropriate and especially when you are listing items. Council has expressed a preference for a bullet points over lengthy paragraphs..
    - c. How to complete specific sections of the Staff Report: Please see the Staff Report Template for information on how to complete specific sections.
    - d. Review: Please ask at least one other person to read and edit your report before sending it to Legal.
2. **Frequency of Updates to City Council:**
    - a. Critical Priorities: If you are the owner of a Critical Priority, please provide a progress report to City Council once a month. This should be a work session item unless the Critical Priority Owner and the City Manager agree that the progress report can be a Manager's Report.
    - b. High Priorities: If you are the owner of a High Priority, please provide a progress report to City Council at least once every six months and more often if needed. This should be a work session item.
3. **Formatting**
    - a. Font:
        - i. Please use Arial 12, as it is very easy to read on the iPad
        - ii. It is OK to slightly reduce the font size, to Arial 11 or 10, for tables or if you are showing a hyperlink.
    - b. Page layout:
        - i. Please use only Portrait layout for your report AND attachments. If you change the layout to Landscape in your report or attachments, when your report is integrated into the Council packet, is causes problems with how the packet displays on the iPad
        - ii. Please keep the margins at 1 inch. Again, this helps with the iPad.
    - c. Text Alignment: Please use left justification.
    - d. Spacing: Please leave a single space between paragraphs. Please do not leave a space between a heading and the paragraph that follows.
    - e. Inserting graphics/charts/spreadsheets:
        - i. Please use the "Paste Special" function of Microsoft Word when pasting a graphic, chart or spreadsheet into a staff report.
        - ii. Please double check that all pages in your report are Portrait orientation, including pages where you have inserted a graphic, chart or spreadsheet.
    - f. Inserting Links:

   i. Please use the “Insert Hyperlink” feature of MS Word instead of showing the entire link. If you don’t know how to do this, hit F1 when you are in MS Word and search for “Insert Hyperlink”
   ii. Before you submit your report in MinuteTraq, please test all of your links to make sure they work and are correct

B. Definitions and examples of “Type of Item” in report heading:

1. **Informational:** Item is intended to share information, introduce a topic, and/or provide updates on projects, services and/or programs. Staff may be seeking direction but no action is requested.
2. **Administrative:** Item is intended for action on the regular agenda pertaining to management and implementation of laws and functions. Examples include agreement and contract approvals, resolutions, and appointments. (Exception: plats are approved by ordinance, but are “administrative” by type.)
3. **Legislative:** Item is intended for action on the regular agenda pertaining to the power to make laws. Examples include ordinances and amendments to the Municipal Code, which includes the Land Management Code. (Exception: amendments to the General Plan are made by resolution, yet are still “legislative” by type.)
4. **Quasi-Judicial:** Item is intended for action on the regular agenda pertaining to the determination of individual rights decided by the application of laws, ordinances, facts and their application to the matter before the City Council. Examples include appeals of Planning Commission decisions, Historic Preservation Board or business licensing decisions. .

C. Templates

1. **Staff Report Template:** Please use the Staff Report template for all NON PLANNING related items. Planning Department Staff Reports will continue with their current template for now.
2. **Staff Communications Report Template:** Staff Communications Reports, formerly known as Managers Reports, are things about which you would like to inform City Council, and no decisions or direction is required by Council. Use the same header section as the Staff Report template, however please change the title to Staff Communication Report. Also – you don’t need to use ANY of the balance of the staff report template. These reports usually lend themselves to a few paragraphs in length and format.
3. **Closed Report Template:** Please use the same Staff Report Template as you would use for a non-Closed item. Please remember to include a Closed Session Cover Sheet.
4. **Closed Session Cover Sheet:** Please include for all Closed Reports.
5. **Study Session Overview:** Please have a written report for all Study Sessions, including Joint Meetings between City Council and a Board/Commission. For Study Session Staff Reports, please include, at a minimum, the report header and the Executive Summary.

D. Staff Reports Schedule

1. **Closed Reports:**
    a. Schedule: The schedule for Closed Reports is the same as for reports going into the regular City Council packet. Exceptions may be granted by the City Attorney or City Manager in limited circumstances.
    b. Do not put Closed Reports into MinuteTraq: Closed reports should be emailed to Legal and Executive and not included in MinuteTraq.
2. **Extension of Deadline**: The City Manager or City Attorney *may* grant an extension of a deadline. Please make the request to the appropriate individual; asking the City Attorney for an extension of a Legal Deadline or the City Manager for an extension of the Executive Deadline. Please confirm that deadline extension in an email *to* City Manager or City Attorney and *cc* the other individual on the email.
3. **Staff report deadlines:**
    a. Peer Review: Please ask at least one other person to read and edit your report before sending it to Legal.
    b. Legal deadline:
        i. *Submit to Legal*: Please have your report routed to Legal no later than noon 10 days before the Council meeting (noon on Tuesday, the week before the City Council meeting).
        ii. *Legal routes report back to Author:* Legal will approve, approve with edits or reject a staff report by 5pm the day after it is submitted to Legal (5pm on Wednesday, the week before the City Council meeting). If you are going to reject substantive changes from Legal, please notify the City Attorney via email of the reason why you are rejecting substantive changes. If Legal makes comments in your report, please do not delete those comments before routing the item to Executive for review.
    c. Executive Deadline:
        i. *Submit to Executive:* Please have your report routed to Executive no later than 5pm the Thursday before the Council meeting.
        ii. *Executive routes report back to Author:* Executive will approve, approve with edits or reject a staff report by midnight on the Sunday before the City Council meeting. Please remember accept or reject changes as appropriate and turn off Track Changes. If you are going to reject substantive changes from Executive, please notify the City Manager via email of the reason why you are rejecting substantive changes.
    d. City Recorder Deadline
        i. *Submit to City Recorder:* Please have your report routed to the City Recorder no later than noon the Monday before the Council meeting.
        ii. *Packet published:* The City Recorder will create the packet by 5pm the Monday before the City Council meeting.

Calendar Layout of Deadlines

Monday	Tuesday	Wednesday	Thursday	Friday
I			**Recommended***:* Staff has department / team review	
	Author submit reports to **Legal by noon**	**Legal** edits returned to **Author by 5PM.**	Author completes Legal edits. Edited reports are due to **Executive by 5pm.**	**City Manager** reviews staff reports Friday. In some cases the CM may review reports over the weekend. Staff reports returned to **Author** by **midnight Sunday.**
Author returns final reports **NOON**. **Packets are compiled/ delivered by 5PM**			**City Council Meeting**	

E. Staff Report Drop-In Time: Most Mondays from 10:15 – 11:00am people who have authored staff report for that week's packet can call or stop by the City Manager's office to ask questions about a staff report or an upcoming City Council presentation.

F. Presenting Your Staff Report to City Council

1. **Prep your presentation:**
    a. <u>Outline:</u> Outline your presentation to City Council on paper & then decide if you need slides. Some of the most effective presentations to City Council use no slides or utilize one or two graphics from a staff report.
    b. <u>Practice:</u> Never practiced a City Council presentation before? Try it out! If you are only giving a 2-3 minute presentation, then practicing it should be easy. Best way to practice is to try out your presentation in front of someone and ask for feedback.
    c. <u>Consider leveraging "the elevator pitch" from the business world:</u> While it is important that you "sell" all of the alternatives – not just the one you are recommending – there are some good concepts that you can borrow from the business world: the elevator pitch. Here's a good, short reference.
2. **Quick Overview of your report for Management Team:** For all items except for those in Closed, the report author should provide a overview at the Management Team Meeting in 2 minutes or less. This is an additional opportunity to practice your City Council presentation. If the staff report author is not available, someone from the team will need to provide this same level of detail about the item. The overview should include:
    i. What problem are you trying to solve?
    ii. What you are asking Council to do?

    iii. Why this item is important to City Council or is important, in general?
    iv. What you think the outcome will be?
    v. Identify any stakeholders who are involved in the process or who may have concerns. How have you engaged those stakeholders?
3. **Email your slides to the City Recorder the morning of the City Council Meeting** If you will be using a slides as part of your presentation, please email a pdf of your slides to the City Recorder between 8am and noon on the day of the City Council Meeting. The City Recorder will compile the pdf of presentations and send those to the City Council before the meeting.
4. **Helping to stay close to the published agenda times:** Here are some ways that you can help keep meetings running on schedule:
    a. <u>Schedule the appropriate amount of time for an item</u>: While we won't always get it right, please do think about how much time is really needed.
    b. <u>Keep your presentation short:</u> City Council members do read their packets, so you can provide a high level summary of the problem, the possible solutions and your recommendation. Think of it as doing a verbal Executive Summary or an Elevator Speech
    c. <u>Managing your consultants & contractors</u>: You are responsible for making sure that your consultants & contractors have timed their presentations and that they are leaving sufficient time for City Council questions and feedback; and
    d. <u>Managing your session</u>: Please take ownership for the length and pace of your sessions. For example, if you have a 30 minute item and at 20 minutes into the item no City Council members have had an opportunity to speak, then you should ask City Council if they want to bring the item back for further discussion. You can also help the Mayor and City Manager by gently reminding City Council of time constraints if it looks like you might run over – and please remember the best time to remind City Council of this is BEFORE you have exceeded your time. <u>*You will need to be delicate in your approach and the City Manager will work hard to support you.*</u>

F. How to get your item on a Future City Council Agenda

1. **Timing:**
    a. <u>Pick a realistic date:</u> Please send your agenda item to the City Manager, the Assistant City Manager & the City Recorder at least three weeks in advance of the City Council Meeting.
    b. <u>Moving an item to a future date:</u> If you need to move an item to a later City Council meeting, please give at least two weeks' notice. Giving less than two week's notice can result in an unusually short meeting one week and a marathon meeting another week.
    c. <u>A note on balancing agenda</u>: There are times that the City Manager, Assistant City Manager or City Recorder will ask to move your item to a later City Council meeting. If you receive a request to push an agenda item a week or two, please know it is NOT that your item in unimportant, it is merely an

attempt to accommodate a request from our elected officials to keep meetings to a somewhat reasonable length.

2. **Is the item for Closed Session?** If so, please email to the City Manager and include the information below identified in items b-e
3. **Get your item on the Tentative Master Calendar:** Please email to the City Manager, the Assistant City Manager & the City Recorder that includes:
    a. Type: Is this item for Study Session, Work Session, Consent Agenda, New Business, Old Business or will the City Council be acting as an agency, such as the Redevelopment Authority, Housing Authority, etc.
    b. Name: The formal name of your report
    c. Date: The date that you would like the item on the City Council agenda
    d. Length: The estimated length of time you believe will be sufficient for you to present this to Council PLUS time for Council discussion PLUS time for public input, if appropriate. If you expect your item to receive more than 10 minutes of public input, please note that in the email.
    e. Notes: Anything special you want the City Manager, Assistant City Manager or City Recorder to know about this item? Might be something like "needs to be after 5pm so X group can be there"
4. **Acknowledgement that item has been placed on the agenda:** One of the aforementioned people to whom you send an email will send you an acknowledgement that your item has been scheduled – and will cc the other two people. If you don't receive an acknowledgement, please feel free to send a snarky email along with a forward of your original message.
5. **Schedule your item in MinuteTraq:**
    - Click "New" on the tool bar
    - Click on staff report
    - Fill in boxes with subject, initiator, meeting date, category – then SAVE
    - Now you will be able to upload attachments by clicking add file
    - Fill in the formal title box with the official name of the item that will be seen on the agenda
    - For Report Body, put your cursor in the Report Body box, then click the W on the bottom left of the screen (which will open a Word document). Write or copy a summary of the item, then X out of the document and it will be saved in the Report Body box
    - Click the Submit button, or if you are still working on the draft, click Save and Close.
    - After submitting, an email will pop up to begin the review process, click Send