



North Port Commission Handbook

A Guide for New City Commissioners

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INTRODUCTION

Congratulations On Your Election

Membership on the North Port City Commission is both a challenging and satisfying experience.

For government to run effectively in North Port, it takes a cooperative effort. Individual goals must be reconciled to form a team goal. You are one of five Commissioners and a member of that team.

Together, the team carries out and/or assists in carrying out obligations to the residents of North Port. The Commission has the ultimate responsibility of making policy decisions. As a city Commissioner, you have taken on the responsibility of serving as a vital link in providing resident input in the decision-making process.

This handbook has been prepared to assist you in your role as a City Commissioner. The background information it contains about certain issues and items will hopefully make the process of decision-making easier. For more detailed information concerning the City, please consult the City Charter and City's codes. The City Charter states the powers and/or duties of the:

- City Commission Section 5.02;
- Mayor Section 5.03;
- City Manager Section 12.06;
- City Clerk Section 13.05; and,
- City Attorney Section 14.05

The City Manager, City Clerk, and City Attorney are also available to answer any questions you might have concerning the City of North Port.

This manual is meant to be an overview and any detail information may be referenced with appropriate Code, Ordinance, or Resolution.

Some Interesting North Port Statistics

-The City of North Port was founded in 1959. The City gets its name from once being a part of “North Port Charlotte”. By referendum in 1974, the City's residents approved a change to its name to North Port, dropping Charlotte from its name to proclaim the city as a separate identity.

-The City is 104.16 square miles

-Currently the City has more than 70,000 residents with a median age of around 44 years old. The population was 57,357 at the 2010 US Census.

-At the last Census the racial makeup of the City was 87.6% White, 7% African American, 0.3% Native American, 1.2% Asian, 0.1% Pacific Islander, 1.7% from other races, and 2.2% from two or more races. Hispanic or Latino of any race were 8.7% of the population.

-As of 2010, the median income for a household in the city was \$53,815.

-There are 10,362 acres of green space in the City, zoned Conservation or Recreation/Open Space. This includes 8,593 acres of Myakka State Forest as well as land along the Myakkahatchee Creek.

-The City of North Port is the only city in the state of Florida to have a state forest completely within its boundary.

-There are 64,626 single family platted lots in the City which are zoned Agriculture, Residential Single Family, or Residential Two Family.

-There are 4,715 approved and platted units in the West Villages, with another 584 in the approval process. They are allowed a total of 16,400 per our Comprehensive Plan.

-There are 1,481 approved and platted lots in The Woodlands (Panacea) Development of Regional Impact (DRI).

-North Port has five public elementary schools, one public charter school (all grades), two public middle schools, and one public high school.

- Toledo Blade Elementary School (K-5)
- Glenallen Elementary School (K-5)
- Cranberry Elementary School (K-5)
- Atwater Elementary School (K-5)
- Lamarque Elementary School (K-5)
- Imagine School at North Port (K-12) Upper and lower campuses.
- Heron Creek Middle School (6-8)
- Woodland Middle School (6-8)

- North Port High School (9-12)

-The City of North Port has 26 parks and facilities, including:

- 2 community centers
- 3 outdoor sports facilities
- 4 community parks
- 10 neighborhood parks
- 7 special use/green space areas
- 2 community pools

-The City has five fire stations with plans for a sixth in the West Villages area.

-The Police Department also has a substation on North Port Blvd.

-The City as a whole has more than 600 employees

-The City has 813 miles of Roads and 81 miles of canals

Checklist

Being a new Commissioner is exciting, challenging, and carries an enormous amount of responsibility. Adjusting your life to fit those responsibilities can appear to feel overwhelming in the beginning. To help make sure that all “the loose ends are tied,” the following checklist has been created. The list will remind you of all the important things that you need to do as a new Commissioner. After you have completed these items you will be ready to get started.

City Clerk’s Office

- _____ Meet with City Manager, City Clerk, and City Attorney for brief orientation
- _____ Obtain a copy of the City Charter
- _____ Obtain a Code Book
- _____ Introduce Yourself to Each Department Director. The City Clerk’s Office can assist you with scheduling
Department tours
- _____ Schedule Orientation Workshop for incoming Commissioners with Senior Commissioners (The City Clerk can assist with scheduling)
- _____ File Form 1 Financial Disclosure Form with the Sarasota County Supervisor of Elections within
30 days of appointment or employment and then annually by July 1 of each year (The City Clerk can assist in providing the current year form)
- _____ Check with City Clerk or City Attorney to File Form 6 when applicable for Full and Public Disclosure of
Financial Interests
- _____ Order Business Cards
- _____ Complete Commission Information Sheet
- _____ Obtain information on annual ethics class requirement
- _____ Obtain a Sunshine Law Manual

Human Resources

- _____ Obtain Access Cards to City Hall
- _____ Complete Insurance Form
- _____ Complete Direct Deposit Form
- _____ Obtain an Achieve Anything gym membership

Information Technology Office

- _____ Obtain E-mail Access, Desk phone password, cell phone and other technology needs from the IT Division
- _____ Read and sign Mobile Device Policy (defines standards and procedures for use of cell phones, texting and retention of text messages)

City Manager's Office

- _____ Schedule a Photo Opportunity through the Communications Division
- _____ Submit a Professional and Personal Biography through the Communications Division
- _____ Obtain the Commission's Strategic Planning Materials
- _____ Obtain Access to Commission Adopted Plans/Books (i.e. Master Plans, ULDC, Code Book, etc.)
- _____ Attend Planning and Zoning Meeting
- _____ Learn about Departments Through Onboarding Videos (see page 9)
- _____ Contact Communications Division to set up Social Media, Twitter, Facebook

Administrative Support

Staff/Clerical Support

General staff and administrative support to members of the City Commission is provided through the City Clerk's Office for official City business. Administrative services including scheduling of appointments, receipt of telephone messages, and word processing is available as needed.

Calendar Appointments

The Clerk or Clerk's staff will schedule meetings, events, and other calendar appointments on your individual calendars. If you find multiple appointments on your calendar that may cause a conflict or if you need clarification on what you should accept in regards to meetings, please see the Clerk for questions.

Mail and Telephone Messages

Any mail addressed to you at City Hall will be available in your in-box next to your door outside of your office. Since correspondence you receive regarding City business is public information, once opened, please provide the mail to the City Clerk for filing. A copy will be available to you if desired. Generic mail, advertisements, etc. are not required to be maintained by the City.

Additionally, citizens attempting to contact you at City Hall by telephone may leave you a message on the City's voice mail system if they prefer. Staff can provide instructions for you to access voice mail messages from your home or office.

The City Clerk will assist with handling all official outgoing mail of the Commission.

Computers, cell phones, and technology

Commissioners are issued devices and applications that assist them with conducting City business. Commissioners receive a lightweight laptop computer, office phone, Apple iPad, Apple iPhone and Microsoft Office software. Information Technology provides direct technology support to Commissioners, which includes access to support professionals who provide training and issue resolution. The Information Technology Service Desk can be reached by phone at (941) 429-7100, or by email at ServiceDesk@cityofnorthport.com. Information Technology and the City Clerk's department jointly provide training and support to Commissioners in the use of technology in City Chambers.

Mobile Device Policy

The mobile device policy is located in the "Policy and Procedures" tab of the City's NPWeb intranet website, and City employees who are issued a mobile device must sign the policy signature page and send to Human Resources for filing.

Each employee will receive a monthly cell phone bill. The employee is responsible for reimbursing the City for any personal calls. Employee will identify the personal phone calls, take the phone bill to Central Cashiering on the first floor in City hall, and pay for these calls at the current rate of \$0.05/minute per call.

Use of Credit Card

City Commissioners receive a credit card for travel purposes only. The card may be used for travel related expenditures with the exception of food. All meal related costs are determined by Federal per diem amounts published each year. These rates are used to calculate the per diem meal expense for travel.

Pay Schedule

City Commissioners are paid in accordance with Ordinance 2018-22 on a bi-weekly pay schedule for a total of twenty-six (26) pays per year.

Commission Video Resources

The City has put together a series of short videos to help Commissioners and all City employees better get to know the place they serve. You can find these videos on the City's P Drive > HR Public > Training Videos > Onboarding Videos

Departments

City Manager's Office
Fire Rescue
Human Resources
Information Technology (IT)
Neighborhood Development Services
Police Department
Public Works
Utilities Department
Parks and Recreation
Social Services

Orientation Videos

Incident Command System
Benefits
Customer Service
Fleet & Fuel
IT Orientation
Public Records
Risk Management
Wellness
Branding

Commissioner and Candidate Tutorial Video Resources

Florida League of Cities

From ethics to leadership the Florida League of Cities offers a number of webinars to help work through and understand some of the hot topics.

Florida League of Cities Webinars: <http://www.floridaleagueofcities.com/university/webinars/on-demand>

Continuing Education in Ethics

<http://www.floridaleagueofcities.com/university/continuing-education-in-ethics>

<https://www.youtube.com/watch?v=4urPoMkEW3U>

First Amendment Foundation

The first Amendment Foundation can be a great resource for public records and sunshine law.

<https://floridafaf.org/programs-and-services/videos/>

Training and Conferences

As a City Commissioner, you will periodically have the opportunity to attend seminars, municipal league functions, community events, and other activities. To the extent you are comfortable, every effort should be made to attend these events. Following is a list of events and seminars that will be especially helpful to Commissioners.

- Institute for Elected Municipal Officials - Following local elections, the Florida League of Cities offers a newly elected officials' institute. These educational sessions take place after newly elected officials have taken office. They give participants an opportunity to get acquainted with State law, policies and practices of municipal government, and to ask questions and network with other officials. The primary objective of the Institute is to provide elected municipal officials with an intensive academic program that will assist them in effectively meeting the requirements of their elected role. The program offers a comprehensive overview of Florida municipal government, presented by a faculty of top professionals in the field. Started in 1992, the IEMO program has graduated more than 2,100 municipal officials. The Institute is a three-day program structured in a Friday through Sunday format. The goal is to make the program as accessible as possible. The IEMO class is offered every January, June, and October. A Level II course is offered every April and October; a Level III is offered each March. Information will be provided to you as it becomes available.
- The Florida League of Cities annual conference is typically held in August of each year and moves around the state to different cities. The program gives all municipal officials the opportunity to expand their expertise in the handling of everyday city business as well as learn more about current issues affecting the municipalities in Florida. Officials are strongly encouraged to attend.
- The Florida League of Cities Legislative Conference generally is held each November. During this meeting, the League's Legislative Policy Statement is approved by the membership. The policy statement, the work product of the League's five legislative policy committees, directs the League's lobbying efforts for the upcoming Florida legislative session. Keynote speakers are also on hand to provide their perspective on the key municipal issues and the state's political climate. The League's purpose is to focus on those legislative issues most likely to affect daily municipal governance and local decision making. The Municipal Home Rule Powers Act and the Florida Constitution provide that cities in Florida have the authority to govern themselves locally, independent of state control. Preserving Home Rule, educating citizens on this valuable right, and maintaining a focus on those issues that directly affect self-governance, service delivery and the quality of life of each municipality are essential goals of the Florida League of Cities.
- Every year during the State Legislative session, League members attend Legislative Action Days in Tallahassee to hear from legislators and League staff on what the legislative session holds for municipalities. Following the meeting, delegates go to the Capitol to meet with their legislator's one on one and to let them know what issues are important to the League and Florida cities. Legislative Action Days is a valuable opportunity for members to get to know their legislators and to view the Legislature at work first hand. The date of this conference varies year to year, depending on session schedules.

- The Florida League of Cities uses legislative policy committees to help shape the legislative priorities of the League. In an effort to get more cities involved, the League limits each city to having no more than one elected official on each of the Legislative Policy Committees. However, an elected official and a city employee from the same city may serve on the same policy committee. The policy committees typically meet four times a year at varying places throughout the State. One is in conjunction with FLC Legislative Conference and another is in conjunction with FLC Annual Conference. This year the Committees are:
 - Finance, Taxation and Personnel Committee
 - Transportation and Intergovernmental Relations Committee
 - Energy, Environment, & Natural Resources Committee
 - Growth Management & Economic Development Committee
 - Urban Administration Committee

- The Florida League of Cities also offers an online library of webinars that are free. These are recordings of courses that have taken place. The library – or “Webinar Archive” - can be found at <https://floridaleagueofcities.com/university/webinars>

- The National League of Cities holds an annual Congressional City Conference and City Summit. A gathering of city officials; the Congress of Cities is held each year in November or December in a selected city. The conference provides educational content on the most pressing challenges facing city leaders. Conference attendees hear from prominent speakers and issue experts, participate in leadership training sessions, attend issue-specific workshops, mobile workshops, and leadership training sessions. The National League of Cities has seven Federal Advocacy Committees as follows:
 - Finance, Administration & Intergovernmental Relations
 - Energy, Environment & Natural Resources
 - Community & Economic Development
 - Human Development
 - Transportation & Infrastructure Services
 - Public Safety and Crime Prevention Committee
 - Information Technology & Communications

If a Commissioner is interested in representing the City on a legislative policy committee please see the City Clerk for assistance.

Setting Up Social Media Accounts

Now that you're in office, you may feel the need to reach out to your constituents more frequently through your own personalized Commissioner social media pages. The Communications and Outreach Division is happy to help. We can sit down and go over the possibilities of a Facebook and/or Twitter page in your Commission name.

Archiving for Public Record

All accounts and passwords will be managed by you. However, we will need some basic information to archive your pages for public record. We use a third-party software which archives anything you or anyone else puts on your pages. Any discussion on policy and City related matters should be archived and limited to your Commissioner page. You should be very careful about what you post through your own personal social media pages as this can be viewed as circumventing the public records laws. Protect yourself!

It should be noted that any comment you make with your "Commissioner account" on someone else's page or a group page is NOT archived. If you feel the need to get involved in areas outside of your archived page, you are going to want to screen grab and record that comment. There has not necessarily been a specific legal opinion on this, but again, protect yourself!

Policy

Currently, there is no policy specifically for Commissioner's social media use. Again, you should be familiar with State law concerning Sunshine Law and public records. However, we do have a basic social media employee manual and policy recommended by the National Labor Relations Board. You will find that not everything in it is applicable for a Commissioner, but there is some helpful information.

Terms of Use

The City has also created a standard Terms of Use which you may want to put somewhere on your Commission page. You will inevitably run into a situation dealing with foul language, off topic comments, and other questionable material. The Terms of Use may help you in deciding if something is appropriate or not. While it is a guideline, you should be very limited in impacting your constituents First Amendment rights. Many of these subjects have not been decided by the judicial system. You can find our Terms of Use on the City website at any time by searching "Terms of Use" or by using this link: <http://www.cityofnorthport.com/government/city-newsroom/terms-of-use>

For further information please see the Social Media Use section.

DUTIES & CONDUCT

Responsibilities

As a City Commissioner, you will face many challenging issues about the City's growth and development that must be resolved. Your decisions as a Commissioner today will shape the North Port of tomorrow.

Being an elected Commissioner is a perfect opportunity for genuine public service. There are many important responsibilities that go along with being a Commissioner. This section will sum up some key issues that you may want to consider as you settle into your new responsibilities.

- Understand the scope of the position and operating procedures. This information can be obtained by referring to the Code of the City of North Port, Florida.
- Individual members should refrain from representing their own views or recommendations as those of the Commission unless the Commission has officially voted on the recommendation. If a Commissioner is making a recommendation or expressing personal views, the Commissioner should say that they are representing only themselves as individuals.
- As a Commissioner, you should consider what is best for the entire community. You now represent the public interests of the entire City.
- A Commissioner serves as a link between the community, staff, and the City by proposing new City programs and providing a channel for citizen response to these programs. It is important for the Commission to know the thoughts of citizens concerning these City programs. This knowledge will help Commissioners build a consensus around common goals and objectives.
- A Commissioner should do his/her homework and be thorough on recommendations. Commissioners should completely review staff reports, plans, and materials provided before meetings.
- A Commissioner should be conscious of the relationship between the Commission and the staff. This relationship is essential for successful operation of any Commission.
- The City staff works for the City Manager, and through him/her they work for the City Commission. Staff does not directly work for Commissioners. Therefore, it is not appropriate for Commissioners to direct staff to do specific work.
- Commissioners should try to establish a good working relationship with the other Commissioners. The success or failure of the Commission efforts is largely dependent on the degree of cooperation among the members of the Commission.
- Each member should do his or her part to ensure that the meetings proceed in an orderly and constructive manner. The Mayor is responsible for ensuring that Commission meetings move along without delay and with decorum.

- When a Commissioner is participating in outside political activities, he/she should make it clear that the title is being used for identification only and that opinions do not represent those of the entire Commission.
- The single most difficult job of a Commissioner is to balance diversified views and find the common interest. It is easy to respond to a group interest without considering if this is the majority viewpoint. A Commissioner must consider all those affected. This is not to say that the community input should be ignored, but it should be placed in perspective. It is very difficult for the Commission to do what everyone wants, but decisions should reflect the things that most people need.

Code of Ethics

Conflict of Interest/Gifts

State laws (Florida Statutes Chapter 112) are in place which prohibit any action by a Commissioner that may constitute a conflict of interest or an improper receipt of gifts. The purpose of such laws and regulations is to ensure that all actions are taken in the public interest.

The Florida Commission on Ethics annually publishes a guide that explains the ethics statutes, including conflicts of interest and receipt of gifts. The guide can be found here:

<http://www.ethics.state.fl.us/Documents/Publications/GuideBookletInternet.pdf?cp=2018914>

Any time a Commissioner believes the potential for a conflict of interest exists or is unsure about gifts, he/she is encouraged to consult with the City Attorney or private legal counsel for advice. Staff also may request an opinion from the City Attorney regarding a member's potential conflict. Laws which regulate conflicts and gifts are very complicated. Violations may result in significant penalties including criminal prosecution and/or removal from office.

The City Attorney is always your best point of contact on ethics issues. It is recommended that if any doubt exists, you should consult with the City Attorney.

It is critical to note that while the City Attorney can render advice on the interpretation of State Law, such advice is not absolute. The Florida Commission on Ethics can provide binding interpretations and public officials are allowed to contact the Commission on Ethics for written opinions. You may contact the Commission on Ethics' hotline at (850) 488-7864.

Reporting Forms

State Law requires the filing of various financial and disclosure forms throughout the year. These forms are available at the Sarasota County Supervisor of Elections Office.

A reference table of all financial forms including instructions on filing is located in the Appendix section of this handbook. This information can be found on the Florida Commission on Ethics website

http://www.ethics.state.fl.us/Documents/Forms/Form1.html#form_1

OVERVIEW OF LAWS RELATING TO "THINGS OF VALUE," GIFTS, AND EXPENDITURES (Sections 112.313(2) and (4), 112.3148, 112.31485, and 112.3215, Florida Statutes)

Sections 112.313(2) and 112.313(4), Florida Statutes, prohibit solicitation and acceptance of gifts in certain situations and apply to *all* public officers and employees. Section 112.313(2) prohibits officials from soliciting or accepting *anything* of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the official's action would be influenced. Section 112.313(4) prohibits the official *or his or her spouse or minor child* from accepting anything of value when the official knows, or with the exercise of reasonable care should know, that it was given to influence the official.

EXPENDITURE BAN

Section 112.3215, Florida Statutes, prohibits officials, members, or employees of the State Executive Branch who are required by law to file full or limited public disclosure of financial interests from accepting *any* expenditure* from a lobbyist or a lobbyist's principal. Lobbyists and their principals are prohibited from making such expenditures. Legislative members and employees should refer to Section 11.045, Florida Statutes, which contains a similar restriction.

If the gift or thing of value is not prohibited by any of the above laws, then the following laws apply:

PROHIBITIONS ON GIFTS FROM POLITICAL COMMITTEES

Pursuant to Section 112.31485, Florida Statutes, reporting individuals and procurement employees and their parents, spouses, children, and siblings are prohibited from soliciting or knowingly accepting, directly or indirectly, any gift from a political committee, and a political committee is prohibited from giving, directly or indirectly, any gift to a reporting individual or procurement employee or his or her parent, spouse, child, or sibling. "Gift" is defined—*for purposes of this law only*—as "any purchase, payment, distribution, loan, advance, transfer of funds, or disbursement of money or anything of value that is not primarily related to contributions, expenditures, or other political activities authorized pursuant to chapter 106."

GIFT SOLICITATION PROHIBITIONS

Persons required to file financial disclosure Form 1 or Form 6, including candidates, and State procurement employees are prohibited from soliciting any gift from a political committee, lobbyist** of their agency, or from a partner, firm, employer, or principal of such a lobbyist*, or from a vendor of their agency.

GIFT ACCEPTANCE PROHIBITIONS

Individuals, including candidates, required to file disclosure Form 1 or Form 6 and State procurement employees are prohibited from directly or indirectly accepting a gift worth more than \$100 from a lobbyist*, from a partner, firm, employer, or principal of the lobbyist*, or from a political committee or vendor. However, a gift may be accepted by a person on behalf of a governmental entity or charitable organization, provided the gift is promptly transferred to the intended entity or organization.

GIFT GIVING PROHIBITIONS

Lobbyists, and their firms, partners, employers and principals, and political committees and vendors are prohibited from giving gifts valued at over \$100 to any person required to file Form 1 or Form 6 financial disclosure and to any State procurement employee or to others on behalf of the above.

GIFTS OVER \$25 AND NOT EXCEEDING \$100

Persons required to file financial disclosure Form 1 or Form 6, including candidates for office and State procurement employees may accept a gift valued at more than \$25 but not exceeding \$100 from a lobbyist*, the firm, partner, employer or principal of a lobbyist, or a political committee or vendor. However, any of these persons or entities who gives a gift valued at over \$25 but not exceeding \$100 to a covered reporting individual or State procurement employee must report the gift on Commission on Ethics Form 30 by the last day of the calendar quarter for gifts given in the preceding quarter. Additionally, the donor must notify the recipient at the time a reportable gift is made that the gift will be disclosed as required above.

GIFTS FROM GOVERNMENT AGENCIES and DIRECT-SUPPORT ORGANIZATIONS

State government entities, water management districts created pursuant to Section 373.069, Florida Statutes, the South Florida Regional Transportation Authority, the Technological Research and Development Authority, counties, municipalities, school boards, and airport authorities which lobby governmental entities may give a gift worth more than \$100 to a person required to file financial disclosure and to a State procurement employee if a public purpose can be shown for the gift. Also, a direct-support organization for a governmental entity may give such a gift to a person who is an officer or employee of that entity. The governmental entity or direct-support organization giving such gift must provide the recipient with a statement describing the gift, the date it was given, and its value no later than March 1 of the following year. The reporting individual/recipient then must disclose this information on Commission on Ethics Form 10, which is to be filed by July 1 with his or her annual financial disclosure.

DEFINITION OF "GIFT"

"Gift" means anything accepted by a person or on that person's behalf, whether directly or indirectly, for that person's benefit, and for which equal or greater consideration is not given within 90 days of the receipt of the gift. "Gift" includes real property or the use thereof; tangible or intangible personal property or the use thereof; a preferential rate or terms on a transaction not available to others similarly situated; forgiveness of a debt; transportation (unless provided by an agency in relation to officially approved governmental business), lodging, or parking; food or beverage; dues, fees, and tickets; plants and flowers; personal services for which a fee is normally charged by the provider; and any other thing or service having an attributable value.

"Gift" does not include salary, benefits, services, fees, gifts, commissions, or expenses associated primarily with one's employment, business, or service as an officer or director of a corporation or organization; campaign contributions or expenditures pursuant to the election laws; an honorarium or honorarium expense; an award, plaque, certificate, etc., given in recognition of public, civic, charitable, or professional service; honorary membership in a service or fraternal organization; the use of a public facility or public property made available by a governmental agency for a public purpose; and transportation provided by an agency in relation to officially approved governmental business. Also exempted are some gifts from organizations which promote the exchange of ideas between, or the professional development of, governmental officials and employees and whose membership is primarily composed of elected or appointed public officials or staff, if the gift is to a member of the organization.

QUARTERLY GIFT DISCLOSURE BY REPORTING INDIVIDUALS

All persons required to file financial disclosure and State procurement employees and who receive a gift which is not prohibited, and which is worth more than \$100 must file a Form 9, Quarterly Gift Disclosure, with the Commission on Ethics no later than the last day of a calendar quarter following the quarter in which the gift was received. Gifts from relatives, gifts prohibited from being accepted, and gifts required to be disclosed elsewhere are not reported on Form 9. The form need not be filed if no such gift was received during the calendar quarter.

*"Expenditure" is defined as a payment, distribution, loan, advance, reimbursement, deposit, or anything of value.

**"Lobbyist" means any natural person who, for compensation, seeks, or sought during the preceding 12 months, to influence the governmental decision-making of a reporting individual or procurement employee or his or her agency or seeks, or sought during the preceding 12 months, to encourage the passage, defeat, or modification of any proposal or recommendation by the reporting individual or procurement employee or his or her agency. [Section 112.3148(2)(b)1., Florida Statutes]

Revised 07/15

The Sunshine Law

All 50 states and the Federal government have some type of open meeting or "sunshine" law.



This law was created to ensure ethical action in government. The Florida Sunshine Law is outlined in Florida Statutes, Chapter 286. You will receive a separate publication detailing this law.

Who Falls Under the Florida Sunshine Law?

The current law applies to all elected or appointed members of Commissions or boards of the State, county, municipal corporation or political subdivision; some private organizations which are providing service to a public agency; and individuals who have been delegated authority to act on behalf of a public board or Commission.

What is a Meeting?

The Sunshine Law applies to a meeting of two or more members of the same board or Commission. This may be an in-person meeting, but also applies to exchanges in writing or via telephone, emails, text message, social media, etc. The members of a public board or Commission may meet socially provided that issues that may come before the board or Commission are not discussed. The key to a “meeting” is whether there is “foreseeable action” which may be taken by the public board or Commission.

The law states that the Commission is required to give reasonable public notice of a meeting. This notice is posted with the time and place of the meeting. Minutes of any such meeting must be recorded.

This law is important to understand as a Commissioner.

CITY GOVERNMENT OVERVIEW



Structure of the City of North Port's Government

The government of the City of North Port has been established as a Commission-Manager form of government. This is an extremely popular form of government because it combines political leadership of the elected officials with a strong managerial experience of a City Manager. The most efficient administration of policy is produced because the Commission has a professional working for them. Governmental duties are divided between the Commissioners and City Manager.

Commission Duties

The City Commission acts as the legislative body for the City. This includes a variety of actions and powers that are primarily concerned with matters of policy, budget, and local legislation.

The forms of action include:

- Approving ordinances, resolutions, and contracts
- Reviewing proposals for community needs
- Initiating actions for new programs
- Determining the City's ability to provide financing
- Approving the annual budget presented by the City Manager

The powers vested in the Commission include:

- Authority to adopt bylaws, rules, and regulations
- Issue bonds for municipal purposes after approval by a vote of the residents
- Establish the millage for ad valorem taxes and equalize special assessments
- Make appointments to the various municipal boards of the City

Mayor Duties

Annually, at the first regularly scheduled City Commission meeting in November, the City Commission shall elect, by majority vote, one of its members as Mayor, and one of its members as Vice-Mayor.

The duties vested in the Mayor include:

- Preside at all meetings of the City Commission
- Perform such other duties consistent with the office as may be imposed upon by law or City Ordinance
- Shall vote in the proceedings of the Commission
- Shall be recognized as the official head of the City
- Sign on behalf of the City all intergovernmental agreements, ordinances, resolutions and official documents

City Manager Duties

The City Manager is a professional usually with a background in government management and serves as the chief administrative officer of the City. The manager is responsible for the municipal administration of the City.

The Manager's duties include:

- Administer the day-to-day City operations
- Implement Commission policies
- Promote City goals through the strategic planning process
- Supervise and coordinate the departments
- Appoints and removes directors
- Prepares the annual operating and 5-year capital budget for City Commission consideration

The Relationship Between the Commission and the City Manager

The City Manager is hired by the Commission to administer the day-to-day operations of the City. The manager is expected to abstain from any political involvement, being strictly a non-political administrator. At the same time, Commissioners and other "political" leaders are expected to refrain from intruding on the manager's role as chief executive. The manager is subject to the authority of the Commission, but the Commission should refrain from interfering in administrative matters and emergency operations.

An important part of being a City Commissioner is understanding your relationship to staff. The City Manager, City Clerk, Deputy City Clerk, and the City Attorney are appointed by the Commission and report directly to the Commission. These are the only City employees that the Commission oversees. The City Manager is responsible for all other staff. The City staff implements public policy established

by the City Commission. Commissioners do not have the authority to direct the work of staff members. Therefore, Commissioners should not take administrative matters into their own hands. If there is a concern with actions of staff, the City Manager should be notified.

The staff is responsible to provide the information needed by the City Manager to formulate recommendations to the City Commission. Staff will make recommendations to the City Manager based upon staff's expertise and experience. These recommendations will include the financial feasibility of such a proposal and alternate strategies to be considered by the Commission.

Overview of City Charter and Codes

The City Charter sets forth basic provisions for the organization of the City's government. It may only be amended by a vote of the electors at a general or special election (Florida Statutes Section 166.031).

The City has adopted two codes that contain the City's laws, enforceable within the City of North Port boundaries. The Code of the City of North Port, Florida contains the City's general laws, while the Unified Land Development Code specifically governs how land is developed in the City. Each commissioner will receive a hard copy of both codes; these can also be accessed online at https://library.municode.com/fl/north_port.

If a Commissioner needs assistance understanding or navigating their way through the code books, please contact the following staff:

- 1) For the Unified Land Development Code (ULDC), contact the City Manager
- 2) For the Code of the City of North Port, contact City Manager or City Attorney
- 3) For the Charter, contact City Manager, City Attorney or City Clerk

COMMISSION MEETINGS

Commission Meetings

The Commission shall meet regularly and not less than once each month, but not during the month of August. The City Commission holds its meeting the second and fourth Tuesday of each month in the Commission Chambers at City Hall. The meetings are typically at 1 p.m. for the first monthly meeting and 6 p.m. for the second monthly meeting. The Commission may also hold workshops, as scheduled, to discuss specific topics of public interest. Special meetings take place once a month for proclamations, special award presentations and employee and community member recognitions. This special meeting is scheduled at 4 p.m. on the first Thursday of the month and may begin as early as 1 p.m. for Commission to consider special items.

Pre- Agenda

Pre-agenda meetings are set up with the City Manager and City Attorney beginning the Thursday before a regular Commission Meeting. The meeting agenda is reviewed by the City Manager, who provides a brief explanation of each item, discusses impacts and answers any questions. The City Attorney is present to answer questions and provide further clarification on any legal questions.

Special Meetings

A quorum of the City Commission or the City Manager and one member of the City Commission may call a special meeting of the Commission. When a special meeting is called, a written notice shall be sent to all Commissioners and the City Clerk at least forty-eight hours before the meeting and state the cause for such a meeting.

Emergency Meetings

The City Manager and any one Commissioner may call an emergency meeting. An emergency meeting shall be called only when the conditions and circumstances indicate that emergency measures must be taken.

Workshop Meetings

Workshop meetings are meetings where the commission reviews and discussed items. The commission may not make final decisions during the workshop meetings.

How to Add an Item to the Agenda

The City Manager shall prepare an agenda for all formal and informal meetings, except special meetings where time does not permit.

Proclamation procedures: Standing requests or rolling requests for proclamations will not be accepted. Requests for proclamations will be received by the City Clerk the month prior to the meeting where the proclamation is requested to be read.

Agenda Items: The City Manager or designee shall review requests for inclusion on any agenda. The City Clerk shall be responsible for the preparation of each agenda for all meetings held by the City Commission. The City Manager shall advise the City Clerk as to which items are to be included on an agenda. The Commission or individual Commissioners may submit an agenda item for inclusion to the City Manager and / or the City Clerk.

Requests for inclusion on any agenda shall be signed and submitted, in writing, to the City Clerk. Requests shall state the nature of the item to be included, together with a statement of requested action. Background documentation, including but not limited to PowerPoint presentations and applicable maps, shall be submitted along with the request. Any additional items or corrections submitted after the agenda has been posted must be submitted to the Commission and City Clerk for publication. Any additional backup information to be considered must be provided no less than 24 hours prior to the meeting. All items requiring a Commission vote shall include suggested forms of appropriate motions. All requests for inclusion on any agenda, with the exception of bona fide emergency items and time sensitive items, shall be received by the City Clerk no later than the close of business on Monday of the week prior to the week of the targeted commission meeting.

Conduct of Meetings

The Mayor shall preside over all meetings. In his/her absence the Vice Mayor shall preside. The presiding officer has the responsibility to preserve the order and decorum of the meetings.

Following is an excerpt from the City's code describing rules and enforcement of meeting decorum:

Code of the City of North Port, Chapter 2-Administration, Article II.-City Commission, Division 2.-Meetings,

Sec. 2-58. - Rules of decorum.

- (a) *Preservation of order and decorum while in session.* While the commission is in session, the commissioners must preserve order and decorum, and a commissioner shall neither, by conversation or otherwise, delay or interrupt the proceedings or the peace of the commission nor disturb any commissioner while speaking or refuse to obey the orders of the mayor. Any commissioner needing to leave during the meeting will notify the mayor.
- (b) *Persons addressing the commission.* All comments shall be polite. Proper titles shall be used at all times, to contribute to a respectful and business-like atmosphere. The broadest possible accommodation shall be provided for statements of personal opinion, but no one shall engage in personal, impertinent, slanderous or profane remarks. Yelling, threatening or abusive language is unacceptable.
- (c) *Members of the audience.* No person in the audience shall engage in disorderly conduct such as hand-clapping, yelling and similar demonstrations, which conduct disturbs the peace and good order of the meeting.
- (d) *Exception.* Except for members of the commission and city staff, no person shall be allowed to approach the commission dais without the consent of the mayor.

Sec. 2-59. - Enforcement of decorum.

- (a) *Removal of person disturbing meeting.* The mayor or designee shall maintain decorum at city commission meetings. The mayor may interrupt any speaker to maintain order and decorum, but such interruption shall not reduce the speaker's time. Members of the audience who become disruptive to the proper conduct of the meeting shall first be counselled about their behavior. If the disruptive behavior persists, the mayor is given the right and the authority to require such person to leave the meeting, to be accompanied by a police officer, if necessary. Persons violating F.S. § 871.01 may be arrested by police officers present and noting the willful interruption or disturbance.
- (b) *Attendance by chief of police or designee.* The chief of police or the chief's designee shall attend all commission meetings for the purpose of maintaining order.
- (c) *Motions to enforce.* Any commissioner may move to require the mayor to enforce these rules and the affirmative vote of a majority of the commission shall require the mayor to do so.
- (d) *Adjournment.* In the event that any meeting is willfully disturbed by a group or groups of persons so as to render the orderly conduct of such meeting infeasible and when order cannot be restored by the removal of individuals who are creating the disturbance, the mayor may adjourn the meeting and the remaining business considered at the next regular meeting or at a special meeting or other meeting pursuant to section 2.54.

Communications



Communications

Overview

Perhaps the most fundamental role of a Commissioner is communication – both with the public to assess community opinions and needs and with staff to provide policy direction and to gain understanding of the implications of various policy alternatives. Because the City Commission performs as a single body, it is important that general guidelines be understood when speaking for the Commission. Equally important, when members are expressing personal views and not those of the Commission, the public (and members of the media) should be so advised prior to making a statement. To foster a successful communications effort, it is helpful for Commissioners to discuss their views during Commission meetings and not just utilize other public forums (through the media, during public gatherings, etc.).

Correspondence from Commissioners

Members of the Commission will often be called upon to write letters to citizens, businesses, or other public agencies. Typically, the Mayor or City Manager will be charged with transmitting the City's position on policy matters to outside agencies on behalf of the City Commission. Individual Commissioners will often prepare letters for constituents in response to inquiries or to provide requested information. City Commission letterhead is available for this purpose, and staff can assist in the preparation of such correspondence. Due to the Open Records Law, copies of such letters must be given to the City Clerk for filing.

On occasion, members may wish to transmit correspondence on an issue which the Commission has yet to take a position or about an issue for which the Commission has no position. In these circumstances, members should clearly indicate within their letters that they are not speaking for the entire Commission but for themselves as one member of the Commission. City letterhead and office support may be utilized in these circumstances.

Correspondence between Commissioners

The Sunshine Law requires boards to meet in public; boards may not take action on or engage in private discussions of board business via written correspondence, e-mails, text messages, or other electronic communications (From 2018 Edition Sunshine Law Manual)

If there is information that a Commissioner desires to be shared among all Commission, best practice is to:

- 1) Forward the information to the City Manager or City Clerk who can then disseminate the information among the Commission either via e-mail or memorandum.
- 2) Communicate information during Commission communications at the end of a Commission Meeting. Example would be communicating what events/conferences

Commissioners are planning on attending. This will serve beneficial so the City can be represented at multiple functions.

The following are commonly used terms and practices to provide recognition to an individual or group and/or enable legislation within the City.

Proclamations

Ceremonial proclamations are often requested of the City in recognition of an event or individual. Proclamations are not statements of policy, but a manner in which the City can make special recognition of an event (e.g. National Telecommunicators Week). As part of his/her ceremonial responsibilities, the Mayor usually presents proclamations issued by the Commission.

Ordinances

An ordinance is a local law enacted by the City Commission which applies only within the City of North Port boundaries. City ordinances are established so as not to be in conflict with any higher state or national law or constitutional provision. More information can be found in the City Charter, Article IX and in the Florida Statutes Section 166.041(1)(a).

Resolution

A resolution is an expression of a governing body concerning matters of administration, an expression of temporary character, or the provision for the disposition of a particular item of the administrative business of the governing body. More information can be found in the City Charter, Section 9.08 and in the Florida Statutes Section 166.041(1)(b).

Correspondence to Commissioners

City of North Port
City Commission
City Hall, Second Floor
4970 City Hall Boulevard
City of North Port, FL 34286
(941)429-7000 Office
commissioners@cityofnorthport.com

See-Click-Fix “North RePort”



The City has partnered with SeeClickFix for an app we've named the "North RePort". The program allows citizens to report issues, request, and track services. The free non-emergency app also makes it easier to connect with the City's award-winning web and social media pages.

Using GPS within the user's phone, the app can pinpoint where the reported situation is and map it for staff. From issues like pesky potholes to troubled traffic lights, users can provide pictures, videos, and specific descriptions to help get the job done. Anyone can view, comment on, and vote to fix problems submitted by others. Users can even create their own "watch areas" to receive notifications about all issues reported in the specific area they choose.

The additional transparency is also a higher level of accountability for City staff and provides analytics to streamline processes. Representatives from each City department are trained and are ready to accommodate users.

The North RePort mobile app is available for download in the Android and iPhone app stores. Just search "North RePort". A web-based version is available at www.cityofnorthport.com/online-services/northreport

The Public Records Law

City records, with a few exceptions, are open to the public (Florida Statutes Chapter 119). The Supreme Court of Florida has construed “public records” to include “any material prepared in connection with official agency business which is intended to perpetuate, communicate, or formalize knowledge of some type.”

Florida Statutes Definition of Public Records

All documents, papers, letters, maps, books, tapes, photographs, films, sound recordings or other material, regardless of physical form or characteristics, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

This includes electronic documents, such as text messages, emails, and social media.

Florida Statutes Definition of an Agency

Any state, county, district, authority, or municipal officer, department, division, board, bureau, commission, or other separate unit of government created or established by law and any other public or private agency, person, partnership, corporation, or business entity acting on behalf of any public agency.

Public Records Requests

Per the City’s code, if a Commissioner receives a request for a public record, he/she should forward that request to the City Clerk.

The law requires that all agency records may be inspected and examined by any person desiring to do so, at any reasonable time, under reasonable conditions, and under supervision by the custodian of the public record or the designee. A copy or a certified copy of the record must be furnished upon payment of the fee prescribed by law or, if a fee is not prescribed by law, upon payment of the actual cost of duplication of the record.

An agency may not impose a waiting period before allowing access to public records, but there may be a reasonable delay in producing records. This is not done to frustrate a person’s right to review public records but gives the custodian reasonable time and the ability to protect the records and keep them safe.

Social Media

All of the City of North Port’s official social media accounts are backed up by an archival firm so that they are within compliance of the Florida Public Records Law. City Commissioners should discuss their personal social media use with the City Attorney.

Social Media Use



Social Media Terms of Use

By posting or commenting on any social media platform used by the City of North Port, you participate by your own choice, taking personal responsibility for your comments, your username and any information you provide therein. You further agree to the following terms of use:

The City of North Port maintains a social media program for the purpose of engaging and interacting with our community, providing relevant and timely community news, information and events, distribution of crime prevention and public safety tips, for urgent notifications of critical incidents which may affect residents, business owners and visitors of the city of City of North Port, and for those people having an interest in the City of North Port.

Limited Public Forum

All social media platforms used by the City of North Port are designated as Limited Public Forums. The department welcomes a person's right to express his/her opinion and encourages posters to keep comments relevant to the topic in question. Posting of any content on any social media platform used by the City of North Port, by any visitor, follower, subscriber or fan, constitutes acceptance of the terms of use described here in this policy.

For purposes of this policy, a social media platform is the website or app offered to the public to provide audio, video, still-photo or written communication between other members of the public and/or representatives of certain groups, businesses, organizations or departments. Examples of social media platforms include Facebook, Twitter, YouTube, Flickr, LinkedIn, website blogs with commenting capabilities, and forums and emergency notification services.

The definition of content as used in this policy refers to any written copy, photos, graphics, videos, live-video streams, comments or any form of communicative content exchanged between parties.

Emergency or Non-Emergency Requests for Police Assistance

The posting of requests for police assistance, regardless if it is of an emergency or non-emergency nature, is discouraged and will not guarantee a response by the City of North Port or any emergency service provider. In case of an emergency, or if police assistance is needed, please dial 911. If you wish to report a crime or information relevant to a crime, please call 941-429-7300. You may remain anonymous if you wish.

In the event you post information related to a crime, you may be placing yourself in a position of becoming a witness and subject to being subpoenaed into court.

Endorsements

“Friending” or “Liking” the City of North Port, or an officer or employee of the City of North Port, does not indicate an endorsement of that person’s actions or comments.

A comment posted by a member of the public on any City of North Port social media site is the opinion of the commentator or poster only, and publication of a comment does not imply endorsement of, or agreement by, the City of North Port, nor do such comments necessarily reflect the opinions or policies of the City of North Port.

Moderation of Content

The City of North Port 's social media platforms are intended to be "family friendly," When applicable, the department uses platform provided content moderation/filtering options to limit foul or obscene content. The City of North Port does actively monitor the social media platforms used by the department, and will remove inappropriate content as defined below, without prior notice, and as soon as possible. The department shall reserve the right to remove and/or block anyone who posts inappropriate material as determined by the department. This material may include, but is not limited to:

1. Comments not related to the original topic, including random or unintelligible comments;
2. Profane, obscene, or pornographic content and/or language;
3. Content that promotes, fosters or perpetuates discrimination on the basis of race, creed, color, age, religion, gender, or national origin;
4. Defamatory or personal attacks;
5. Threats to any person or organization;
6. Comments in support of, or in opposition to, any political campaigns or ballot measures;
7. Solicitation of commerce, including but not limited to advertising of any business or product for sale. This includes other online pages or organizations asking for donations.
8. Conduct in violation of any federal, state or local law;
9. Encouragement of illegal activity;
10. Information that may tend to compromise the safety or security of the public or public systems;
11. Content that violates a legal ownership interest, such as a copyright, of any party;
12. Harassment or content which constitutes and/or facilitates stalking;
13. Content which violates the right to privacy;
14. Encouragement of violence;
15. Repetitive content. Repeated posting of identical or very similar content in a counter-productive manner;
16. Comments which may reasonably interfere with, inhibit, or compromise law enforcement investigations, police tactics, police responses to incidents and/or the safety of police staff and officers.

17. Posts or comments which contain any external links.

The department does not allow posting of photos or videos by anyone other than members of the department.

Denial of Access

The City of North Port reserves the right to deny access to any City of North Port social media sites for any individual, who violates the City of North Port's Social Media Terms of Use, at any time and without prior notice.

If you wish to contest the removal or hiding of your content, or your denial of access ("banned") from our social media platforms, you may do so by contacting us at 941-429-7000 and requesting to speak to a member of our social media team.

Facebook's Community of Standards

All comments posted to any City of North Port Facebook site are bound by Facebook's Community Standards, located at <http://www.facebook.com/communitystandards>, and the City of North Port reserves the right to report any violation of Facebook's Community Standards to Facebook with the intent of Facebook taking appropriate and reasonable responsive action.

The Twitter Rules

When applicable, the City of North Port reserves the right to report any violation of the Twitter Rules, located at <https://support.twitter.com/articles/18311> with the intent of Twitter taking appropriate and reasonable responsive action.

YouTube Community Guidelines

When applicable, the City of North Port reserves the right to report any violation of the YouTube Community Guidelines, located at <http://www.youtube.com/yt/policyandsafety/communityguidelines.html> with the intent of YouTube taking appropriate and reasonable responsive action.

Instagram Community Guidelines

When applicable, the City of North Port reserves the right to report any violation of the Instagram Community Guidelines, located at <https://help.instagram.com/477434105621119/> with the intent of Instagram taking appropriate and reasonable responsive action.

Pinterest Acceptable Use Policy

When applicable, the City of North Port reserves the right to report any violation of the Pinterest Acceptable Use Policy, located at <https://about.pinterest.com/en/acceptable-use-policy> with the intent of Pinterest taking appropriate and reasonable responsive action.

LinkedIn User Agreement

When applicable, the City of North Port reserves the right to report any violation of the LinkedIn User Agreement, located at <https://www.linkedin.com/legal/user-agreement> with the intent of LinkedIn taking appropriate and reasonable responsive action.

External Links

The provision of direct links should not be construed as an endorsement or sponsorship of these external sites, their content, or their hosts. The City specifically disavows legal responsibility for what a user may find on another site, whether or not operated by the City. The views and opinions of the authors of documents published on or linked to the City's social media accounts do not necessarily state or reflect the opinion, policy or position of the City.

The City of North Port is not responsible for the content, quality, accuracy or completeness of any offsite materials referenced by or linked through the City's social media accounts. By using the City's social networking sites, the user acknowledges and accepts the risk of injury or damage from viewing, hearing, downloading or storing such materials rests entirely with the user and that the City is not responsible for any materials stored on other social networking sites or websites, nor is it liable for any inaccurate, defamatory, offensive or illegal materials found on other social networking sites or websites.

The City does not endorse any content, viewpoint, products or services linked from its social networking sites and shall not be held liable for any losses caused by reliance on the accuracy, reliability or timeliness of such information. The City does not warrant the accuracy or reliability of or endorse any products or service providers listed or linked to its site.

Privacy of Children

We believe in the importance of protecting the privacy of children online. The Children's Online Privacy Protection Act (COPPA) governs information gathered online from or about children under the age of 13. Verifiable consent from a child's parent or guardian is required before collecting, using, or disclosing personal information from a child under age 13. Our site is not intended to solicit information of any kind from children under age 13. If you believe that we have received information from or about children under age 13, please contact us.

Questions

Should you have any questions in regard to items contained herein this Terms of Use, please contact the City of North Port social media manager at 941-429-7000.

Pursuant to Fl.Stat. 668.6076: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to us. Instead, contact our office by phone or in writing.

SOCIAL MEDIA PROCEDURES

As more citizens in the North Port community make the shift towards, or include the use of, social media technologies to receive and share information and communicate, it is imperative that the City include these technologies as part of its efforts to enhance customer service and outreach and increase citizen engagement.

It is the policy of the City that a standard for interaction with social media tools and their associated technology is hereby established.

I. SCOPE AND APPLICATION

These procedures, and its provisions, apply to and serve as a guide to all City employees, departments, and contracted entities that distribute information on behalf of the City while engaging in any social media activities.

II. MANAGEMENT POLICY STATEMENT

It is the policy of the City Manager to adopt guidelines for all interaction with social media technology and its accompanying disciplines so that the City has a standard approach to the collaboration and sharing of information on and in various public domains to provide consistent communication across all media.

Social media by the City of North Port is to be used to inform and engage the public in their City government's projects, programs, and services.

III. DEFINITIONS

- **Social Media** are various forms of user-created content tools such as social networks, blogs, video sharing, podcasts, wikis, message boards, and online forums. Technologies include but are not limited to: picture and video sharing, wall postings, e-mail, instant messaging, and music sharing. Examples of social media applications include, but are not limited to: Google+ and Yahoo Groups (reference, social networking); Wikipedia (reference); Facebook (social networking); YouTube and Vine (social networking and video sharing); Flickr, Instagram, and Pinterest (photo sharing); Twitter (social networking and microblogging); Skype (instant messaging and webcam chat); LinkedIn (business networking); and news media comment sharing/blogging, and any City operated website (including YourNorthPort.com, ViewNorthPort.com, or CityofNorthPort.com) that may allow for user engagement. This policy covers all social media tools, both current and future.
- **Social Networking** is the practice of expanding one's business and/or social contacts by making connections using a range of social media tools including blogs, video, images, tagging, lists of friends, forums, and messaging that use the Internet to

- promote such connections through Web-based groups established for that purpose.
- **Social Media Account** shall mean any registration, login credential, tool, forum, website or network that is created or maintained by an employee on behalf of City of North Port for the purpose of establishing or perpetuating a social media presence.
 - **Authorized User** shall mean any employee who has been authorized by their Department Director and registered with and approved by the City Manager's Office to establish, create, edit, or maintain any social media account, and the posts it may contain, in the transaction of official business of the City of North Port.
 - **Post** shall mean any e-mail, message, picture, graphic, image, advertisement, notification, feed, stream, transmission, broadcast, podcast, video, instant message, text message, blog, microblog, status update, wall post, comment, and any and all other forms, means, or attempts at collaboration or communication that is uploaded, posted to, or otherwise displayed on or transmitted by, any Social Media Account or Network.
 - **External Entity** shall mean any person or party not employed by, or not an authorized representative of, the City of North Port.
 - **External Information** shall mean any social media post by any External Entity, and the information or substance it contains.

IV. GENERAL GUIDELINES

1. Social media is meant to be a tool for dialog, engagement, and information sharing. All comments made by both parties (the Authorized User on behalf of the City and a member of the general public) will be monitored closely and will fall under the Terms of Use Agreement. Comments also will be documented for public record purposes.
2. For sites that do not allow the City of North Port to block comments, Authorized Users will not edit outside comments made by members of the public. Any comment that violates the Terms of Use Agreement or disclaimer should be documented for records retention and then deleted from public view. The comment maker should then be notified that he or she has violated the Terms of Agreement, specifying any and all Terms of Use that were violated.
3. Any published content is persistent in the public domain. The City of North Port is responsible for all content published by Authorized Users on behalf of the City. When speaking on behalf of the City, it should be assumed that all communications are in the public domain and available for publishing and discussion in all forms of media.
4. Authorized Users are to review and understand the Personnel Policy Manual, including the Standards of Conduct portion and the Employee Performance portion of the manual. By completing a User Agreement Form for a social media account, an Authorized User is acknowledging that violations of the City's Personnel Policy may result in disciplinary actions.

5. Authorized Users are to ensure all content posted to social media accounts represents the City's point of view and not those of individual employees. Authorized Users who are in doubt should consult their Department Director, the City Manager's Office, or the Community Outreach Division.
6. Authorized Users should exercise caution while interacting with any External Entity, both known and unknown to the user, and the information that the Entity may provide or post. External Information shall not be utilized, commented on, or re-posted, unless the information has been verified or corroborated as true and accurate by independent and/or reputable resources.
7. Authorized Users should respect copyright, trademark, fair use and financial disclosure laws. Do not use third party content without permission. Always protect sensitive information, personally identifiable information, or other confidential information. Do not publish or report on conversations that are meant to be pre-decisional or internal to the City of North Port unless leadership or management has authorized the release of such information.
8. Ensure that social media account implementation and use complies with applicable mandates, including, but not limited to: Section 508 of the Rehabilitation Act of 1973, Chapter 119 Florida Statutes, and any other applicable Federal, State or City law.

V. RESPONSIBILITIES

Authorized Users shall meet the requirements defined in the City of North Port's Personnel Policy Manual, including the Standards of Conduct portion of the manual and the Employee Performance portion of the manual.

A. Department Responsibilities

A1. Before Establishing a Social Media Account

- Contact the Community Outreach Division to discuss objectives, desired outcomes, and measurements for utilizing social media and to help determine its effectiveness in reaching the communication goals.
- Obtain formal approval in the form of a completed User Agreement Form, which shall specify all Authorized Users for the project, and include signatures from the applicable Department Director and the Community Outreach Division prior to establishing any social media account. This form should be stored in the employee's personnel file in Human Resources.

- Establish the Social Media Account using a CityofNorthPort.com e-mail address. Contact the Information Technology Division to determine the appropriate e-mail address and provide all access information to that account to both the Information Technology Division and the Community Outreach Division, including all subsequent modifications to account information.

A2. When Establishing the Social Media Account and during Maintenance of the Social Media Account

- Include an introductory statement that clearly specifies the purpose and topical scope of the social media presence. Where possible, Department social media accounts should link back to www.cityofnorthport.com for the purpose of downloading any forms, documents, and other information.
- Post a Terms of Use Agreement approved by the Community Outreach Division and the City Attorney's Office. The Agreement, in addition to its other language, shall clearly indicate that any Post is subject to public records disclosure.
- All comments, by both the Authorized User and the general public, shall comply with and be enforced by the terms described in the posted Terms of Use Agreement.
- All original content, such as images, documents, and video placed or linked on social media accounts by Authorized Users, should be archived in the event of a public records request.
- Maintain compliance with all applicable Federal, State and City requirements, policies and procedures relating to records retention and public records requests.

B. Information Technology Responsibilities

- Provide Authorized Users information about their ability to access and utilize the Social Media tools authorized by their Department Director and the Community Outreach Division.
- Determine an email address to serve as the official e-mail account for all approved social media accounts. (This can be the individual Account User's assigned City e-mail address or a general account such as communications@cityofnorthport.com)
- Review all login credentials to social media accounts to ensure compliance with password strength requirements and compliance with established Information and Technology practices and industry best practices relating to information systems security.
- Retain a login credential database for social media accounts, to provide for control and continuity of operations.
- Respond to any requests for guidance or opinion regarding technology or information systems security.

C. Community Outreach Division Responsibilities

- Review proposals for new social media projects and provide formal approval or denial.
- Provide counsel to the Department as to the appropriate use of the social media tool and strategic guidance as to the types of information that should be released and the proper measurement for effectiveness.
- Monitor content on each Department social media account to ensure adherence to the

guidelines in this policy. Inappropriate use may result in the removal of the department page or account from these social media sites.

D. City Attorney's Office Responsibilities

- Review and approve any departmental changes or additions to the Terms of Use Agreement, or the general disclaimer, as requested.
- Render opinions on matters regarding disclaimers, terms of use, and privacy concerns as they arise.
- Provide opinions on matters of public records.

VI. PUBLIC RECORDS RETENTION

- Each City social media account must include an introductory statement that clearly specifies its purpose and topical scope.
- Each City social media account also must clearly link to a Terms of Use.
- All social media sites must clearly indicate that all posts are subject to public records laws, including Chapter 119 Florida Statutes.
- Items uploaded to a Social Media account must have originals stored on a City server and/or be easily accessible in the event that the City receives a public records request. The management of this record retention will be overseen by both the Community Outreach Division and the Information Technology Division.
- All original content, such as images, documents, and video placed or linked on social media accounts by Authorized Users, should be archived in the event of a public records request.

VII. USING EXTERNAL LINKS

To meet its purpose, the City's social media accounts may contain links to other social media sites or websites that are not owned, regularly reviewed, or controlled by the City. Also, External Entities may "tag" or link the City's social media accounts to posts.

- When appropriate, include the following disclaimer on social media sites, along with the Terms of Use:

The provision of direct links should not be construed as an endorsement or sponsorship of these external sites, their content, or their hosts. The City specifically disavows legal responsibility for what a user may find on another site, whether or not operated by the City. The views and opinions of the authors of documents published on or linked to the City's social media accounts do not necessarily state or reflect the opinion, policy or position of the City.

The City of North Port is not responsible for the content, quality, accuracy or completeness of any offsite materials referenced by or linked through the City's social media accounts. By using the City's social networking sites, the user acknowledges and accepts the risk of injury or damage from viewing, hearing, downloading or storing such materials rests entirely with the user and that the City

is not responsible for any materials stored on other social networking sites or websites, nor is it liable for any inaccurate, defamatory, offensive or illegal materials found on other social networking sites or websites.

The City does not endorse any content, viewpoint, products or services linked from its social networking sites and shall not be held liable for any losses caused by reliance on the accuracy, reliability or timeliness of such information. The City does not warrant the accuracy or reliability of or endorse any products or service providers listed or linked to its site.

VIII. SECURITY GUIDELINES

In general, Authorized Users should show caution when interacting with External Entities, those both known and unknown to the user. If at all in doubt of the legitimacy of any information sent to you, please avoid said information.

The following guidelines should be adhered to:

- Employ strong passwords which cannot be easily compromised by brute force attacks, including the use of mixed case letters, numbers and valid special symbols.
- Periodically change passwords to social media accounts, and immediately communicate any changes to the Information Technology Division and the Community Outreach Division.
- Refrain from adding, installing, attaching or linking to any additional external services or applications that may potentially grant or enable access to the content, information or posts within the social media account.
- Use caution when accessing links received from External Entities. Exercise caution when utilizing shortened links (links that have been shortened for ease of relaying the original link) from External Entities, as these may lead to a malicious site. Avoid clicking on shortened links from External Entities. Consider requesting the link be re-sent in another form.
- If the social media application installed on a device is identified as a security risk to the City, the Information Technology Division may update, change or remove the application at their discretion.

- Be watchful for spoofed emails and/or websites (seemingly official-looking communications that lead the user to a malicious website or attempt to solicit the user's personal or financial information). Consult Information Technology regarding any security related matter.

IX. GENERAL GUIDELINES

We believe in the importance of protecting the privacy of children online. The Children's Online Privacy Protection Act (COPPA) governs information gathered online from or about children under the age of 13. Verifiable consent from a child's parent or guardian is required before collecting, using, or disclosing personal information from a child under age 13. Our site is not intended to solicit information of any kind from children under age 13. If you believe that we have received information from or about children under age 13, please contact us.

X. COMMENT POLICY

It shall be the policy of the City of North Port that the following agreement must be continuously and conspicuously posted on each social media account established and maintained by the City of North Port, if such capability exists. The agreement shall also be posted on www.cityofnorthport.com for easy access:

A. The City of North Port encourages public interaction with the following caveats:

- All comments will be reviewed (moderated).
- The comment policy (see below) must be clearly stated or linked.
- Comments must not be posted if they contain:
 - Blatantly partisan political views
 - Explicit commercial endorsements
 - Discriminatory, racist, offensive, obscene, inflammatory, unlawful or otherwise objectionable statements, language or content.

B. Comment Policy

To maintain a respectful dialogue, we've posted the guidelines of our comment policy below. In short:

- **Stay focused.** All viewpoints are welcome, but comments should remain relevant to the discussion, the City of North Port's community outreach efforts, public information and the associated Web site.
- **Be respectful.** Personal attacks, profanity, and aggressive behavior are prohibited. Instigating arguments in a disrespectful way is also prohibited.

- **Tell the truth.** Spreading misleading or false information is prohibited.
- **No spam.** Repeated posting of identical or very similar content in a counter-productive manner is prohibited — this includes posts aggressively promoting services or products.

We retain the discretion to determine which comments violate our comment policy. We also reserve the right to remove and/or not allow comments to get posted. The views expressed within posted comments do not necessarily reflect those of the City of North Port.

We recognize that the Web is a 24/7 medium, and your comments are welcome at any time. However, given the need to manage city resources (i.e. - your tax dollars), moderating and posting comments should only be expected to occur during regular business hours.

Reporters are asked to send questions to the necessary media office through their normal channels and to refrain from submitting questions here as comments. Reporter questions will not be posted nor answered.

This comment policy is valid for all discussions on any City managed forum. Thank you for taking the time to review our comment policy. We encourage your participation in our discussion and look forward to an active exchange of ideas.

IX. EFFECTIVE DATE

This policy is effective as of May 4, 2015.

TRAVEL & VEHICLE POLICY

**The following section is an excerpt from the
Administrative Code Article II, Division I which
addresses Commission Travel**

Sec. 2-161. - Authority to incur travel and business expenses.

- (a) Each commission member, city official, employee or person who is authorized by the city commission or city manager to travel to attend a convention, conference, seminar, meeting or other matter on behalf of the city and in connection with official city business, and when the expenses are within the intent of the adopted budget, shall be reimbursed for expenses pursuant to the provisions of this division.
- (b) Traveling expenses shall be limited to those expenses necessarily incurred by the traveler in the performance of duties related to the functions and responsibilities of the city.
- (c) Business expenses shall apply to those expenditures which are incurred in the performance of the public purpose to be performed, including meetings with governmental officials, seminars and training programs, pickup and delivery of parts and equipment, recruitment of personnel or industry, community promotion and any other related activities essential to the performance of the public purpose.

(Code 1990, § 66-1)

Sec. 2-162. - Travel authorization; travel advances.

- (a) All travel must have prior authorization through the completion of a travel authorization form showing the itinerary, the estimated costs, the source of funding and whether or not a travel advance is needed.
- (b) Travel advances may be issued to authorized persons prior to departure on an authorized trip. The cash amount will be based on a schedule commensurate with the known expenses as stated in the travel authorization. If common carrier tickets are necessary, issuance of such tickets shall be made only upon receipt of a travel authorization with proper approval signatures. The authorized traveler receiving a travel advance must keep a record of all travel expenses and report the same.

(Code 1990, § 66-2)

Sec. 2-163. - Forms and regulations.

The city manager shall provide forms for travel requests, expenses, reimbursements and mileage allowances (where applicable) and prescribe such regulations as are reasonably necessary to effectuate the purpose of this division. The city manager shall cause requests for travel expenses and reimbursements to be verified before payment is made.

(Code 1990, § 66-3)

Sec. 2-164. - Schedule for meal allowance and accommodations.

- (a) For purposes of reimbursement, the allowance for meals will be based upon the following schedule:
 - (1) Breakfast allowance will be made when travel begins before 6:00 a.m. and extends beyond 9:00 a.m.
 - (2) Lunch allowance will be made when travel begins before 11:00 a.m. and extends beyond 2:00 p.m.
 - (3) Dinner allowance will be made when travel begins before 6:00 p.m. and extends beyond 8:00 p.m.
- (b) Hotel or accommodation allowance will be made when travel extends overnight.
- (c) No expenses in Sarasota or Charlotte Counties shall be reimbursed unless approved by the city manager.

(Code 1990, § 66-4)

Sec. 2-165. - Per diem.

- (a) When the period of travel conforms to the schedule of allowances in Section 66-164 above, all authorized travelers may be allowed per diem when traveling to a convention, conference, seminar, activity or on city-related business which serves a direct public purpose.
- (b) Composition of per diem.
- (1) Per diem will consist of the basic travel allowance for meals as listed below and actual hotel or accommodation charges when the period of travel extends overnight:

Meal	Allowance
Breakfast	\$ 6.00
Lunch	9.00
Dinner	18.00

- (2) When a meal is included in the cost of registration or admission to a seminar, conference, etc., per diem shall not be paid for that meal.
- (3) Actual meal charges above those stated herein may be reimbursed if accompanied by a receipt and justification for incurring the additional cost. Hotel or accommodation charges must be single occupancy rate and substantiated by receipt.
- (4) Per diems are as stated above or the Federal Per Diem Rate for the location per the United States Federal Travel Regulation (FTR) and Code of Federal Regulations (CFR) chapters 300-304, whichever is greater. If the Federal Per Diem Rate is to be used then the current breakdown for Meals and Incidental Expenses as indicated in the Federal Travel Regulation must be used accordingly.
- (c) Tips and gratuities for meals are included in the basic travel allowance for meals. When actual meal charges are reimbursed, 15 percent may be added to the meal charges, provided that the cost is stated on the receipt.

(Code 1990, § 66-5)

Sec. 2-166. - Transportation.

- (a) All travel must be on a convenient and mainly traveled route. If a person travels by an indirect route for his convenience, any extra cost shall be borne by the traveler. Reimbursement for expenses shall be made accordingly.
- (b) If a privately owned vehicle is authorized by the city manager for travel, the vehicle owner shall be entitled to a mileage rate of \$0.29 per mile or the prevailing rate allowed by the Internal Revenue Service, whichever is greater.
- (c) Transportation by a common carrier which has not been prepaid and for which the authorized traveler seeks reimbursement must be substantiated by an official receipt from the common carrier.
- (d) Transportation by charter vehicles may be authorized when it is determined to be the most economical method of travel, when considering the nature of the business, the number of people making the trip and the most efficient and economical means of travel (considering the time of the traveler, cost of transportation and subsistence required).

(Code 1990, § 66-6)

Sec. 2-167. - Exceptions to transportation reimbursement.

- (a) Travelers shall not be allowed either mileage or transportation expenses when they are transported gratuitously by another person or when they are transported by another authorized traveler who is entitled to mileage or transportation expense.
- (b) Reimbursement for expenditures related to the operation, maintenance, depreciation and ownership of a vehicle shall not be allowed when a privately owned vehicle is used on public business and mileage allowance is paid.

(Code 1990, § 66-7)

Sec. 2-168. - Reimbursable incidental expenses.

An authorized traveler may be reimbursed for incidental travel expenses incurred during the course of travel. These incidental travel expenses include, but are not limited to, the following:

- (1) Taxi, ferry and airport limousine fares.
- (2) Bridge, road and tunnel tolls.
- (3) Storage and parking fees.
- (4) Telephone, FAX and telegraph charges relating to city business.
- (5) Registration, convention or tuition fees not prepaid by the city.
- (6) Tips, other than for food, not to exceed \$5.00 per day.
- (7) Personal calls not to exceed \$3.00 per night.

(Code 1990, § 66-8)

Sec. 2-169. - Auditing.

A travel expense report or voucher as developed by the city manager shall be submitted to the finance department within 30 days after the travel occurs. Each approved travel expense report will be audited by the finance department when received.

(Code 1990, § 66-9)

Sec. 2-170. - Fraudulent claims.

Claims submitted pursuant to this division shall be signed by the authorized traveler and shall be verified by a written declaration that it is true and correct as to every material matter. Any individual who knowingly makes or aids in the making of a false or fraudulent claim shall be guilty of a violation of Florida Statutes and city ordinances and, upon conviction thereof, shall be punished accordingly. In addition, any person who received a travel allowance, advance or reimbursement by means of knowingly submitting a false claim shall be liable for the repayment of the amount into the public fund from which the claim was paid.

(Code 1990, § 66-10)

Secs. 2-171—2-193. - Reserved.

Sec. 2-24. - Eligibility for other expense reimbursements.

(a) *Travel.*

- (1) Travel on city business which requires expense reimbursement shall be preapproved by the city commission.
- (2) Authorized travel and business expenses shall be reimbursed in accordance with the provisions of this chapter.
- (3) Commissioners may use city-owned vehicles if available, for authorized city business outside the corporate city limits. Commissioners shall be entitled to reimbursement for their use of private vehicles for authorized city business outside corporate city limits.
- (4) This article does not restrict commissioners from sharing a city vehicle with a city employee who is traveling to the same destination.

(b) *Supplies.*

- (1) Basic office supplies shall be available at city expense for city business.
- (2) City commissioners shall be entitled to two name tags per term of office and personalized city business cards as needed.
- (3) All other costs are the responsibility of the commissioner.
- (4) City commissioners are not allowed to use city equipment or supplies for personal use.

(Code 1990, § 11-4)

CITY DEPARTMENTS





Charter Officer's/Department Director's Contact Information

Mayor: Vanessa Carusone - Office: 429-707 Cell: 628-2916
E-mail: vcarusone@cityofnorthport.com

Vice Mayor: Linda Yates - Office: 429-7072 Cell: 286--0249
E-mail: lyates@cityofnorthport.com

Commissioner: Chris Hanks - Office: 429-7069 Cell: 628-2919
E-mail: chanks@cityofnorthport.com

Commissioner: Jill Luke- Office: 429-7073 Cell: 628-0757
E-mail: jluke@cityofnorthport.com

Commissioner: Debbie McDowell- Office: 429-7071 Cell: 628-0486
E-mail: dmcdowell@cityofnorthport.com

City Manager: Peter Lear- Office: 429-7076 Cell: 628-8788
E-mail: plear@cityofnorthport.com

City Attorney: Amber Slayton- Office: 429-7253 Cell: 224-4467
E-mail: aslayton@cityofnorthport.com

Interim City Clerk: Katy Peto- Office: 429-7063 Cell: 468-3161
E-mail: kpeto@cityofnorthport.com

Finance Director: Charlina Lowrie - Office: 429-7118 Cell: 628-8792
E-mail: clowrie@cityofnorthport.com

Fire Rescue Chief: Scott Titus - Office: 240-8151 Cell: 724-7840
E-mail: stitus@cityofnorthport.com

General Services Director: Sandy Pfundheller - Office: 429-7129 Cell: 628-3645
E-mail: spfundheller@cityofnorthport.com

Human Resources Director: Christine McDade - Office: 429-7136 Cell: 468-0520
E-mail: cmcdade@cityofnorthport.com

Neighborhood Development Services Director: Frank Miles - Office: 429-7005 Cell: 628-8317 E-mail: fmiles@cityofnorthport.com

Police Chief: Todd Garrison - Office: 429-7306 Cell: 374-9612
E-mail: tgarrison@northportpd.com

Public Works Director: Juliana Bellia - Office: 240-8051 Cell: 628-8455
E-mail: jbellia@cityofnorthport.com

Utilities Director: Rick Newkirk, - Office: 240-8001 Cell: 628-8160
E-mail: rnewkirk@cityofnorthport.com

City Manager's Office

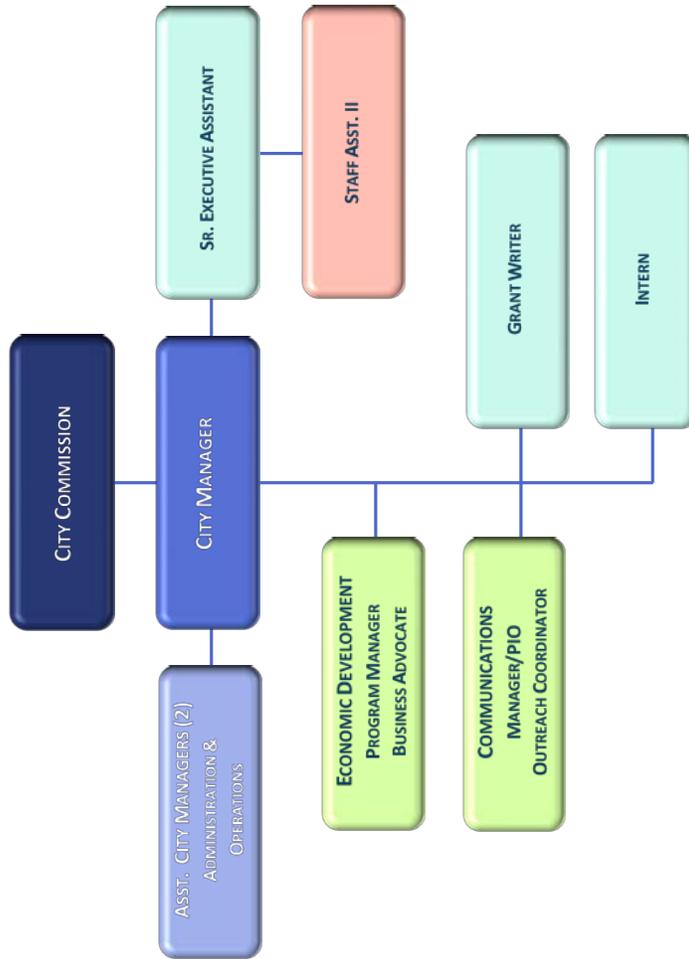
The goal of the City Manager's Office is to provide daily administration of the City and assistance to the City Commission in establishing the policies, programs and services offered to the community.

The City Manager is appointed by the City Commission to serve as the Chief Administrative Officer of the organization and coordinate the fulfillment of policy and programs established by the City Commission. The City Manager provides overall direction to departments that administer City programs and services; implements inter-departmental programs for strategic planning, emergency preparedness and special projects; and fosters intergovernmental relations, lobbying, economic development, and public information efforts. To fulfill these duties, the City Manager is aided by an Assistant City Manager, 8 City departments, and the talent and skills of over 600 City employees. These departments and employees are under the immediate supervision of department directors appointed by the City Manager to ensure quality service to the citizens and visitors of the City of North Port.

The Economic Development Office was established in 2009 and is a division of the City Manager's Department. This office is managed by a program manager who is responsible for planning, coordinating and executing the City's economic development activities and redevelopment initiatives. Some of those duties include working with developers and entrepreneurs to facilitate real estate development. Other duties are focused on business retention and encouraging local start-ups. The business advocate within the Economic Development Office assists local businesses and start-ups with navigating the often-challenging regulations governing their respective activity.

The Communications Office was established in 2007 and is a division of the City Manager's Department. The office is managed by a manager who is focused on connecting the North Port community by telling North Port's story in a variety of different mediums, including video, print, and on-line. This Division plays a key role in developing the marketing, public relations, and communication strategies for the City's programs, projects, and services. The Division also works to provide ways for citizens to engage in their local government and works directly with local media and oversees the City's media relations strategy.

11 Authorized Positions

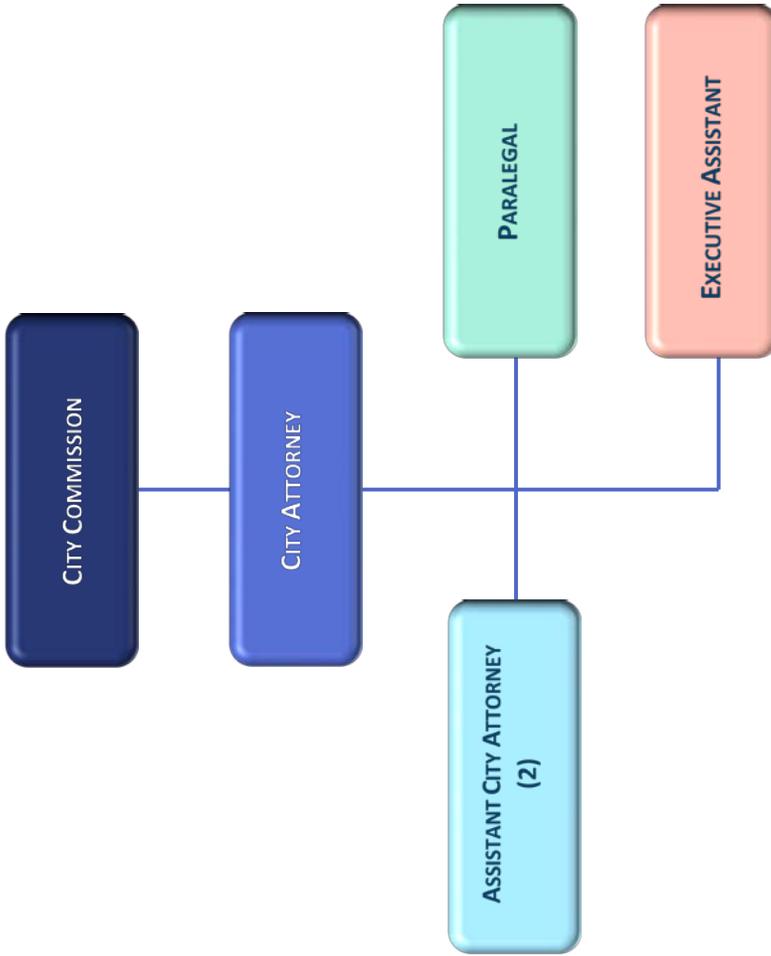


City Attorney's Office

The City Attorney's Office is responsible for all the legal affairs of the City. Functions of the office include but are not limited to:

- Advising the City Commission, City Manager, City staff, and City boards relative to legal matters affecting the City.
- Attending City Commission meetings and workshops, as well as other meetings as needed.
- Drafting and reviewing ordinances, resolutions, contracts, real estate instruments, and other legal documents.
- Conducting legal research and drafting legal opinions.
- Representing the City in civil in judicial and administrative proceedings, including trials, appeals, arbitration, quasi-judicial proceedings, and mediation.

5 Authorized Positions



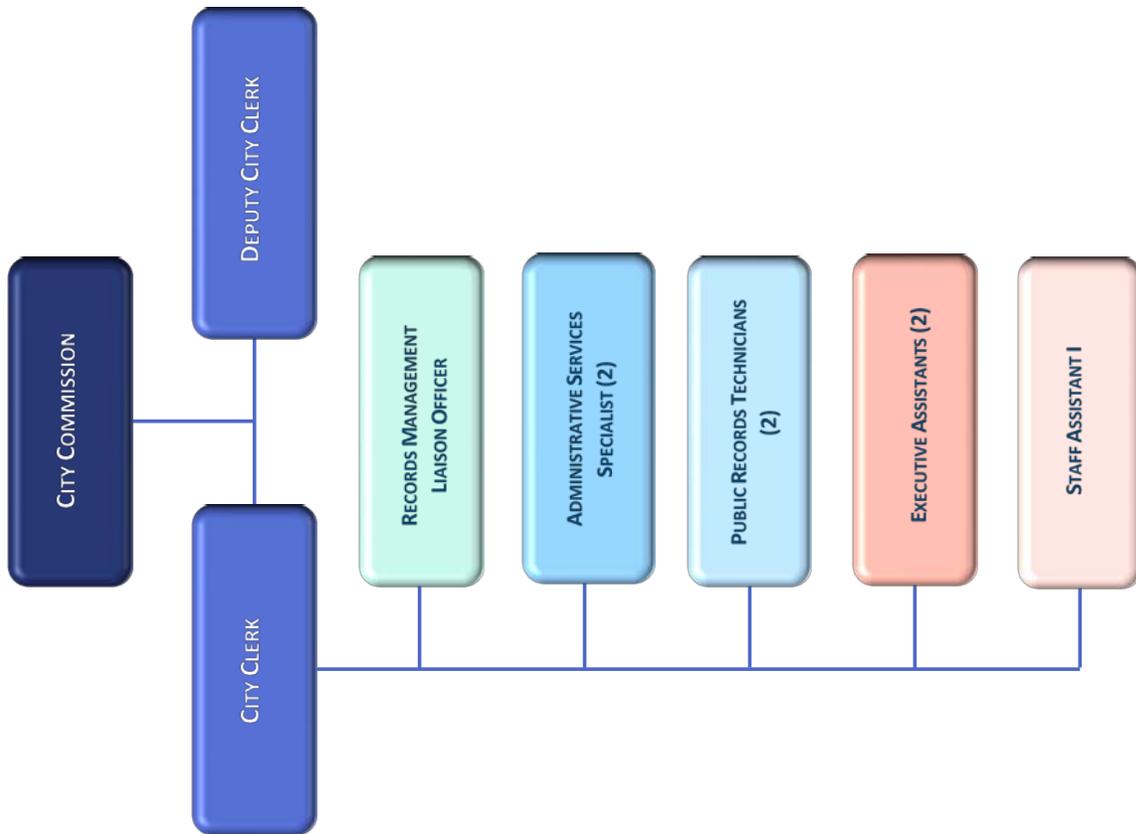
City Clerk's Office

The Office of the City Clerk exists to ensure the integrity of municipal governance through the administration of the electoral, legislative, and record keeping processes as set forth in the City Charter, City's code and State Statute. The City Clerk serves as the Clerk of the Commission and is responsible for keeping a public record of all proceedings of the Commission, including the certification of all ordinances and resolutions. The City Clerk is the official custodian of the City seal and any other papers, documents or records pertaining to the City.

The City Clerk's Office is committed to ensuring an informed citizenry by providing access to City government through open and accessible meetings and accurate recording of the City Commission proceedings; by protecting and preserving City documents and records; by conducting fair and democratic elections; and by providing excellent service to the public.

The City Clerk's Office also plays a key role in the formation and administration of advisory boards; oversees the creation of the City Commission budget; and provides necessary executive and administrative work for the City Commission.

10 Authorized Positions



Finance Department

The primary mission of the Finance Department is to preserve the financial integrity of the City of North Port, while assuring the availability of funds to accomplish the City's goals.

The City of North Port Finance Department's primary areas of service are Finance, Budgeting, Accounting and Purchasing. Financial responsibilities include budgeting, accounts payable, payroll, investment management, debt management, district and capital assessment management, and overseeing the city's budget.

Accounting

The employees of this branch prepare all financial reports in accordance with GAAP (Generally Accepted Accounting Principles), make all payments to vendors, and ensure compliance with state and federal requirements. This branch is also responsible for recording all revenue transactions for the City. These transactions include Utility payments, Solid Waste Pickups, Building Permits, Impact Fees, and Parks and Recreation payments.

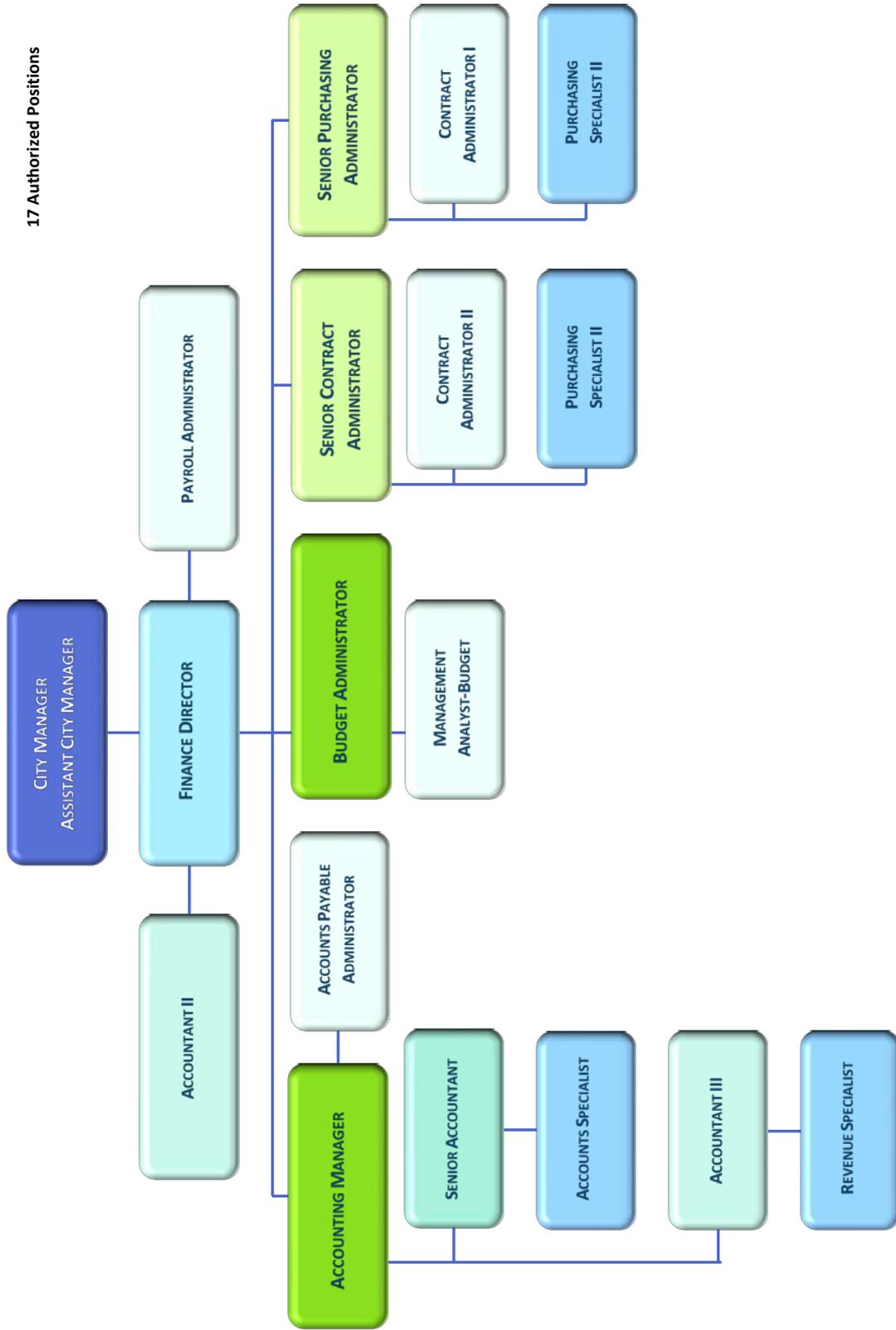
Finance and Budgeting

The Finance Department prepares the budget for the City on behalf of the City Manager and in cooperation with all departments. The fiscal year begins October 1st, and the budget process starts in January.

Purchasing

Purchasing is responsible for developing and implementing all policies and procedures related to purchases for the City of North Port. To ensure the financial integrity of the City, purchases of various goods and services are reviewed by Purchasing.

17 Authorized Positions



Fire Rescue

The North Port Fire Rescue Department offers fire suppression, advanced life support, emergency medical services, disaster preparedness, response and recovery, and fire prevention functions. The Department provides emergency services to the City of North Port and, under interlocal and mutual aid agreements, to portions of unincorporated Sarasota County and Charlotte County.

All line personnel are highly-trained Florida State-certified firefighters and emergency medical technicians or paramedics. The City's Emergency Services Division maintains a State-certified technical rescue team, a mass casualty incident trailer, and a utility-terrain vehicle for patient transport and wildland firefighting.

Administrative Services

Administrative Services provides full support to the department through budgeting, fiscal and property accounting, reception services, and facility maintenance.

Emergency Management Division

The Emergency Management Division ensures City government, residents and businesses are prepared for any hazard. Additionally, Emergency Management maintains the City's Emergency Operations Center for emergencies and disasters which require support from all departments of City government. The North Port Community Emergency Response Team is supported by Emergency Management through organizational guidance, resource support, and mission assignment during emergencies.

Fire Prevention Division

The City's Fire Prevention Division provides fire inspection services during building construction, and annual re-inspections to ensure compliance with the State Fire Prevention Code. Smoke detector checks, station visits, and presentations are a part of the everyday duties. This Division is also responsible for Community Risk Reduction and Public Education programs.

The following is a list of the City's Fire Rescue Stations:

Station 81: 4980 City Center Boulevard, North Port, FL 34286

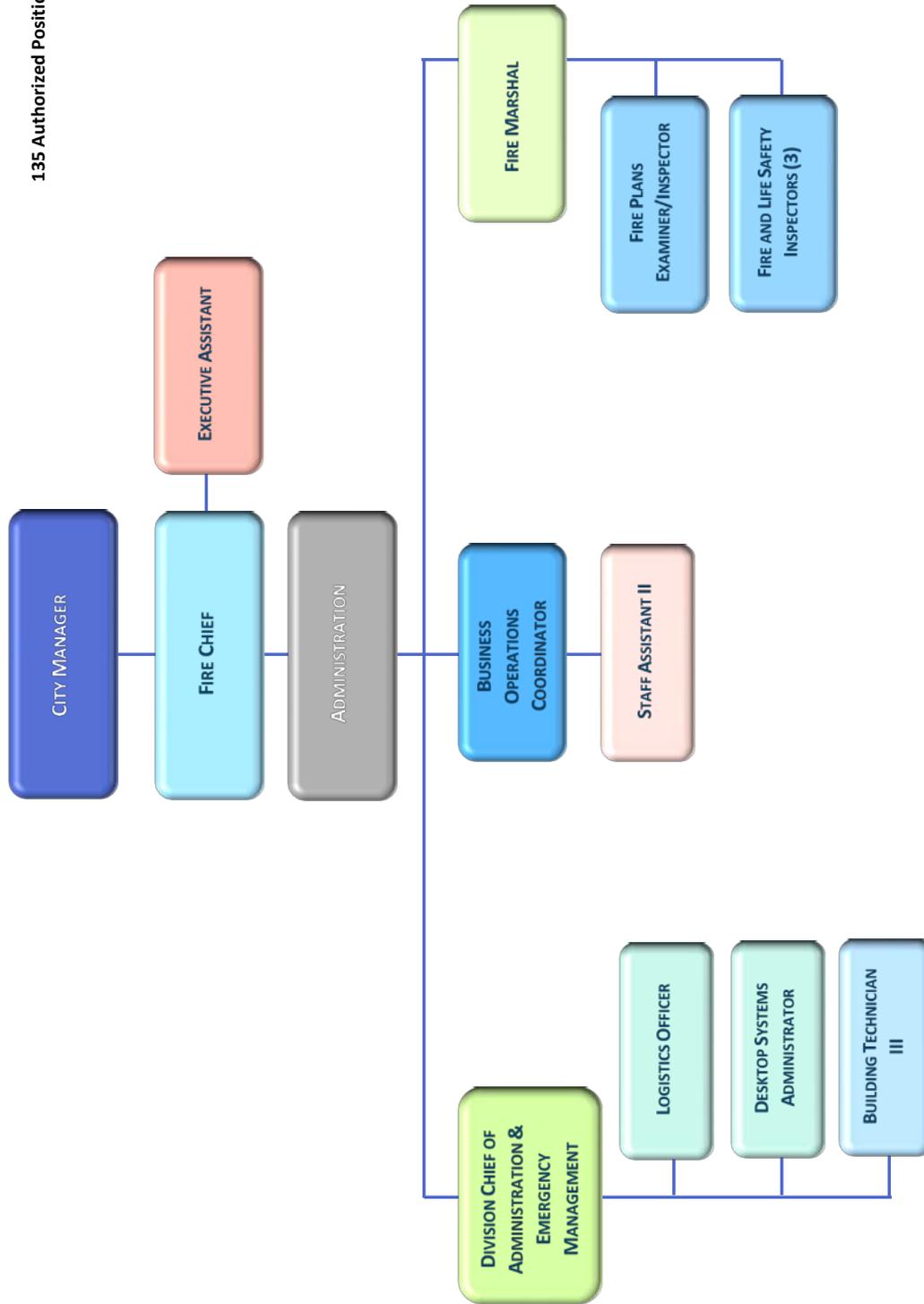
Station 82: 5650 North Port Boulevard, North Port, FL 34287

Station 83: 3601 E. Price Boulevard, North Port, FL 34288

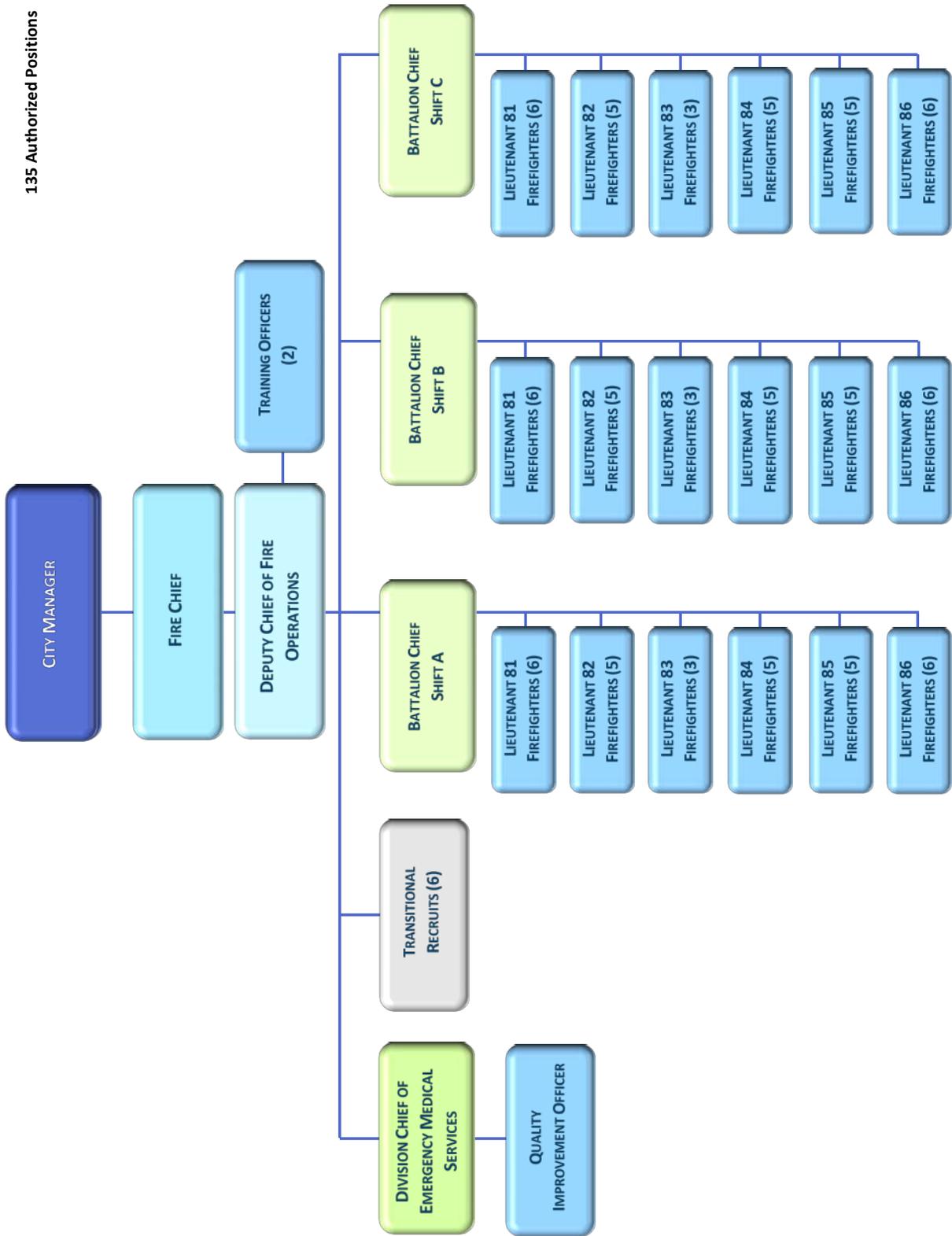
Station 84: 1350 Citizens Parkway, North Port, FL 34288

Station 85: 1308 N. Biscayne Drive, North Port, FL 34287

135 Authorized Positions



135 Authorized Positions

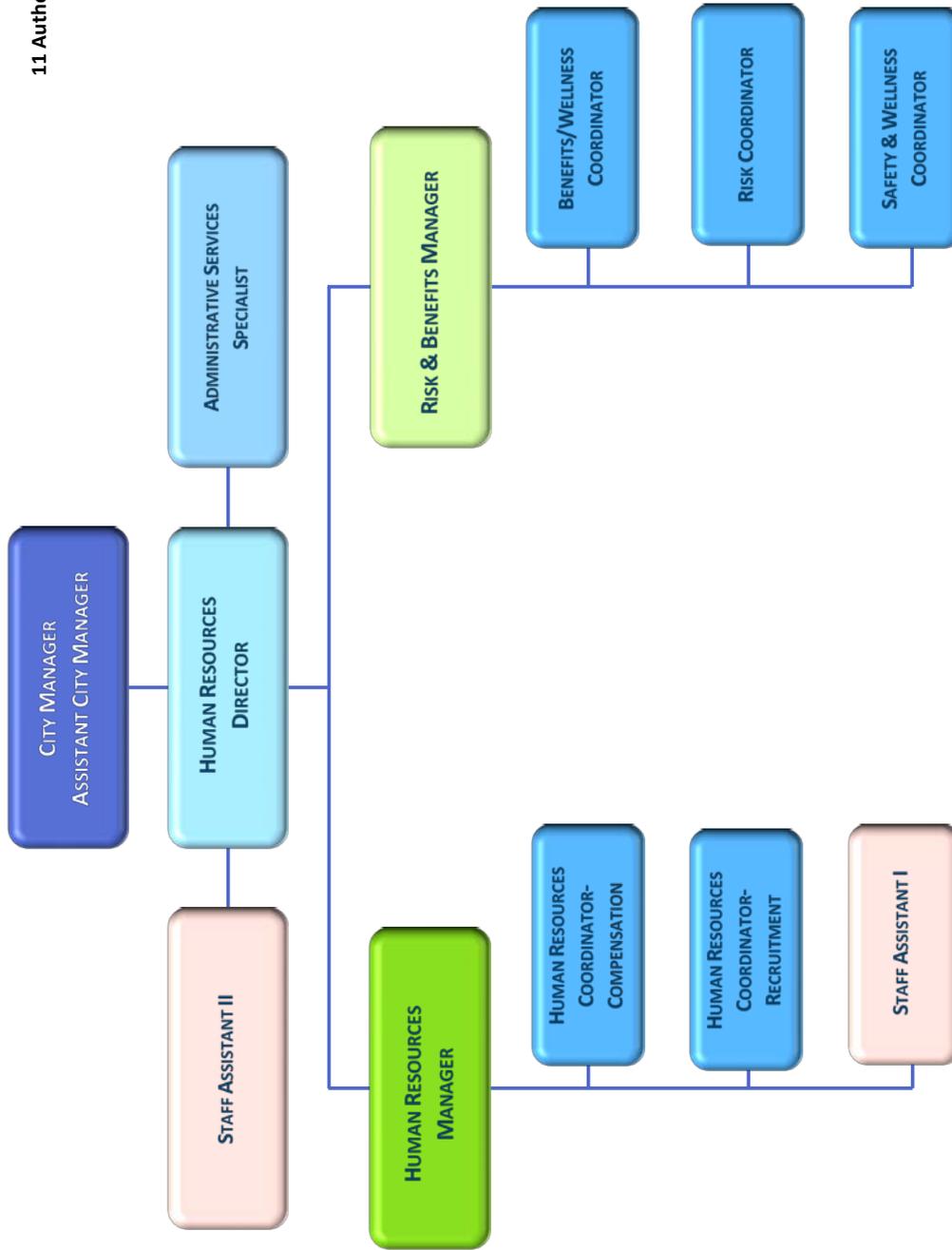


Human Resources

Human Resources continues to support a Citywide workforce of over 600 through a variety of programs and services, including recruitment and retention, benefits administration, classification/compensation, performance management, personnel policy research and development, employee outreach and recognition, labor contract coordination, personnel file maintenance and public records request tracking, training and development.

The Department also oversees the City's safety and risk management programs, workers' compensation and the administration of the City's general liability/property insurance coverages.

11. Authorized Positions

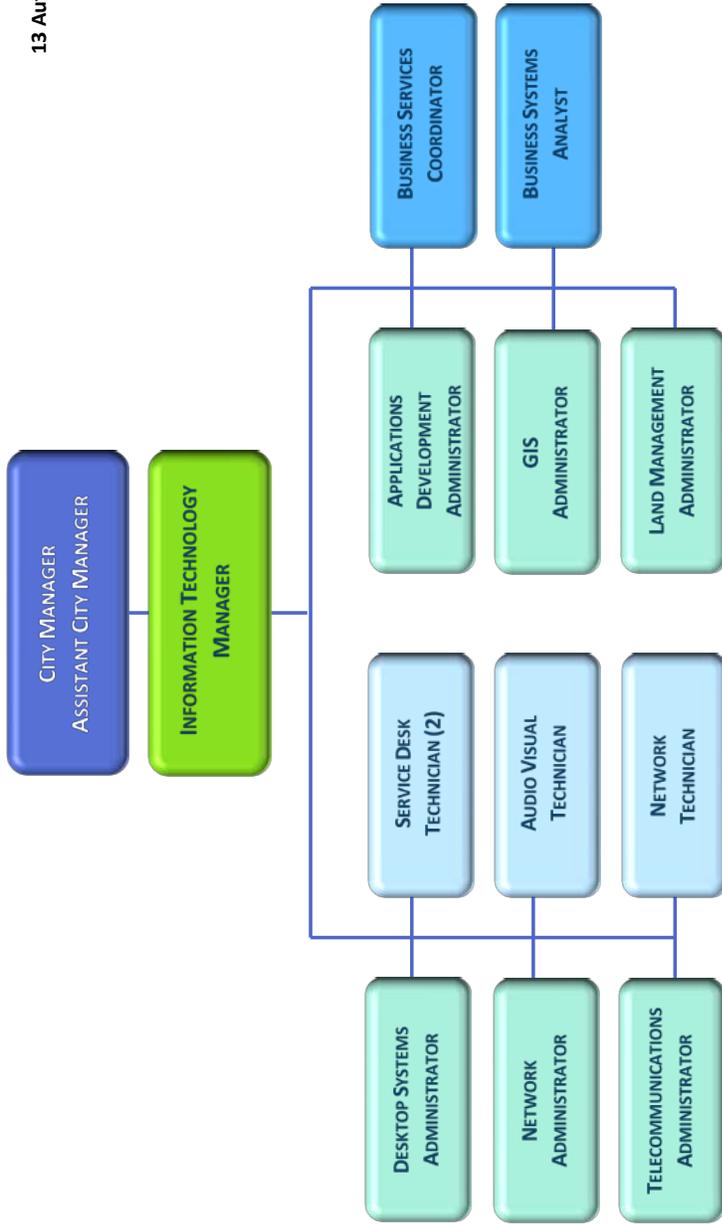


Information Technology Division

Information Technology Division is a division within the City Manager’s office and its purpose is to ensure the integrity of and access to information. Information Technology is responsible for effective and efficient delivery of information technology services that add measurable value to the departments of the City. IT provides a full spectrum of services including administration of networks, servers, client computers, phone systems, mobile devices, applications, audio-visual, GIS and business systems. They also provide business process reengineering, technical training, end-user support and general planning and consultation around technology initiatives.



13 Authorized Positions



Neighborhood Development Services

The Neighborhood Development Services Department facilitates a variety of programs that promote the responsible development of the City as a safe, livable environment for all its citizens. The Department's primary functions include: Administration, Planning and Zoning, Building Inspections, and Code Enforcement.

[NDS Administration Division](#)

The Neighborhood Development Services Department manages the day to day operations of the department. Ensuring a high level of customer service through answering citizen questions, plan review, processing and permits issuance. Staff is responsible for all administrative services related to all permitting, reporting, Business Tax compliance and complies with all record retention in accordance with state requirements.

[NDS Building Division](#)

Administer all provisions of the state adopted building codes. The goal is to assure that all construction, within the City, is constructed to the minimum standard and for the protection of our citizens. This consists of reviewing and inspecting building plans for compliance with both City and state codes. The Arborist has the responsibility of maintaining and regulating the City's Chapter 45, Tree protection Regulations.

[NDS Planning and Zoning Division](#)

Responsible for the administration and management of the City's Unified Land Development Code. The Division's purpose is to advance the community's vision and is separated into two distinct functions. Tactical Planning is concerned with review and permitting of proposed commercial and residential development. Strategic Planning manages and administers the Comprehensive Plan and the Unified Land Development Code including reviews of regional developments, master planning and long-range issues such as transportation, housing and the environment,

[NDS Code Enforcement Division](#)

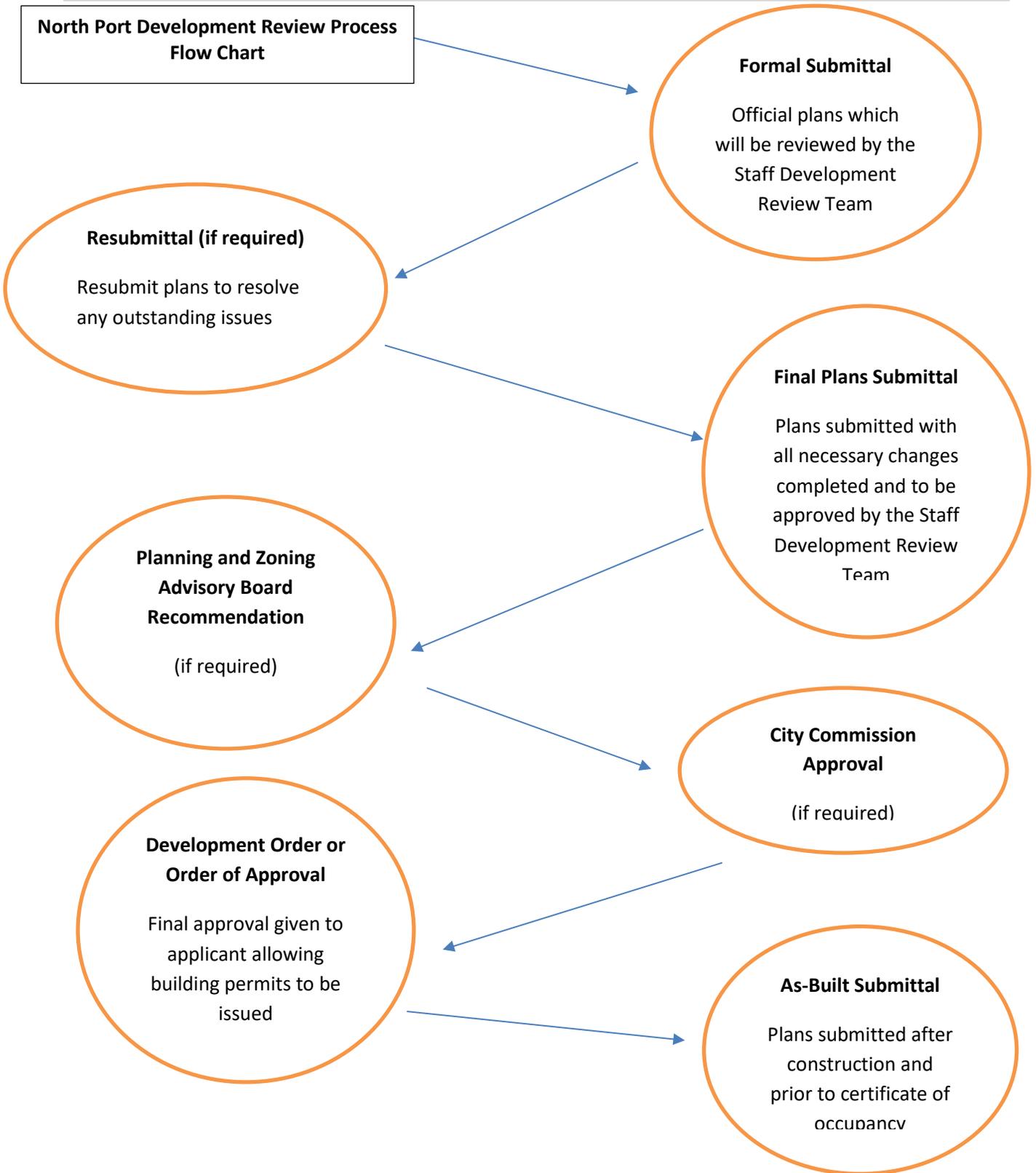
Role is to ensure the health, safety, and welfare of North Port residents and assist in maintaining community standards. Code Enforcement Inspectors are proactive and will inform property owners of an alleged violation of any Code of the City of North Port, Unified Land Development Code or Florida Building Code.

[North Port Comprehensive Plan](#)

The City of North Port Comprehensive Plan is a document created to envision the future growth of our City. It contains goals, objectives and policies to set the vision of the community and guide future decision making.

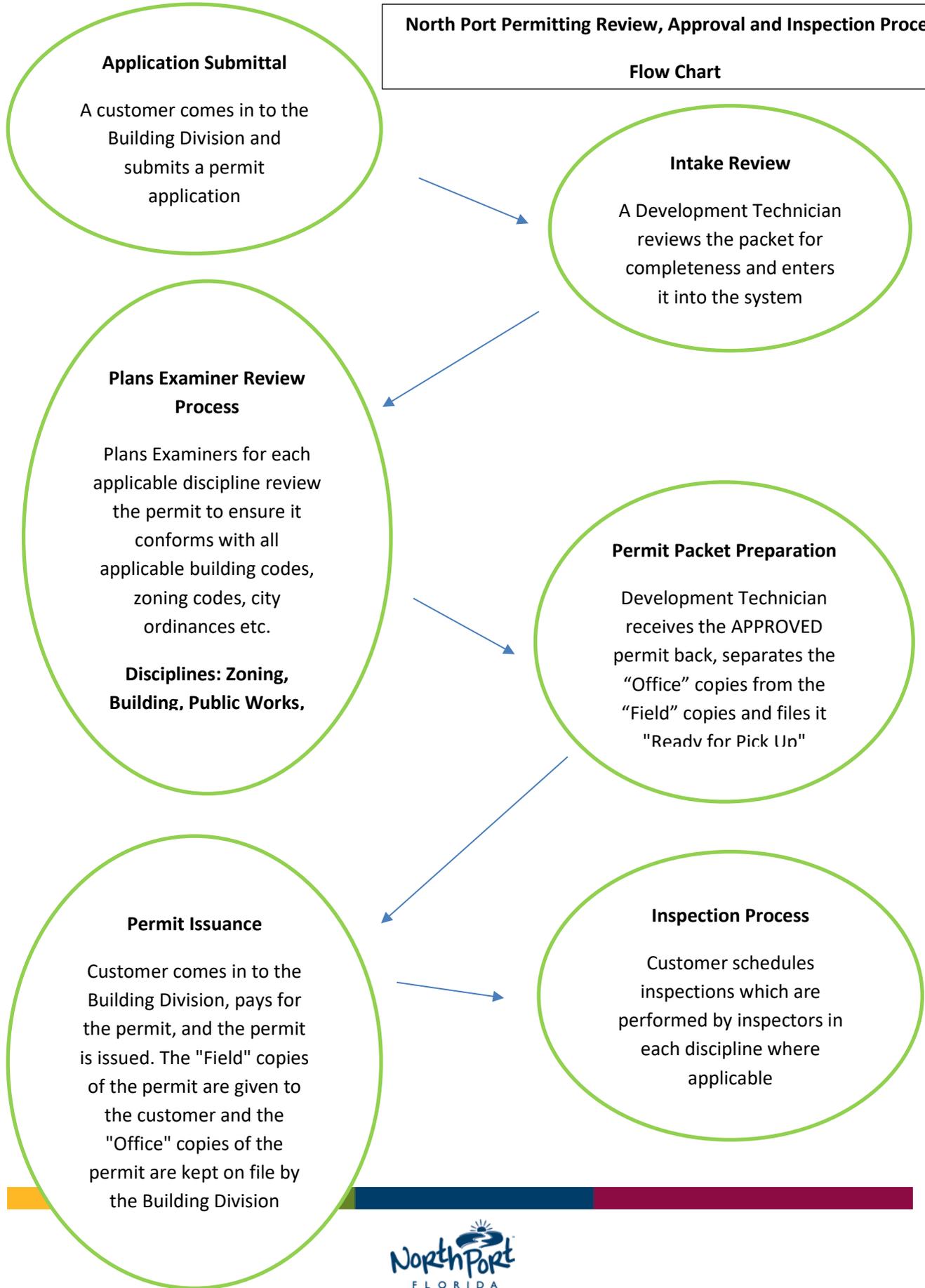
[North Port Unified Land Development Code](#)

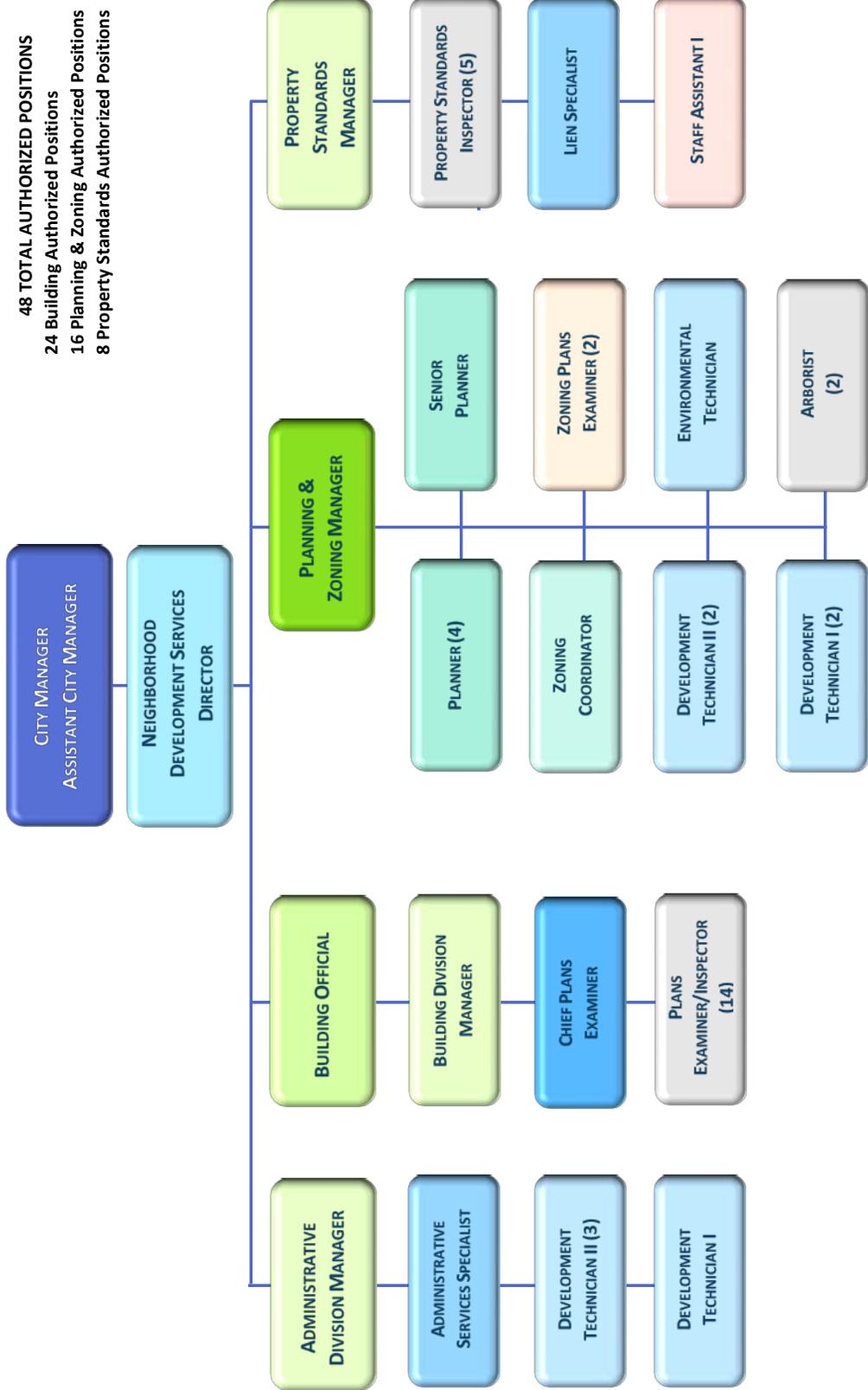
The City of North Port Unified Land Development Code is a document that contains that govern how land is developed in the city. This ULDC is the implementation tool for the Comprehensive Plan.



North Port Permitting Review, Approval and Inspection Process

Flow Chart





Parks & Recreation

The Parks & Recreation Department's mission is to provide diverse recreational opportunities and experiences through the preservation of open space, park settings, recreational facilities, and programs that meet the physical, mental, cultural and social needs of our residents, while enhancing the overall quality of life. The Department operates and maintains 26 parks, recreational facilities, and open spaces and provides a variety of programs, events, and activities for residents and visitors year-round. This includes neighborhood parks, community parks, special use parks, and sports facilities boasting a variety of amenities such as playgrounds, pavilions, basketball courts, tennis courts, outdoor pickleball courts, and canoe and kayak launches. Parks & Recreation also oversees the operations of two full-service community centers, provides pavilion and facility rentals, fitness center services, adopt-a-park program, donation and sponsorship programs, and oversees the general maintenance and operations of Warm Mineral Springs Park. The Department organizational structure includes Administration, Recreation, Parks Maintenance and the North Port Aquatic Center.

[Administration](#) is responsible for Departmental oversight and support to ensure the delivery of cost-effective services, budgetary compliance, efficient resource utilization, and the development of outreach initiatives and strategies.

[Recreation](#) is responsible for the provision of recreational programs, events, services and facilities that enhance quality of life and promote healthy lifestyles.

[Parks Maintenance](#) is responsible for the care, maintenance and preservation of City parks and grounds and provides support and resources for recreational programs and events.

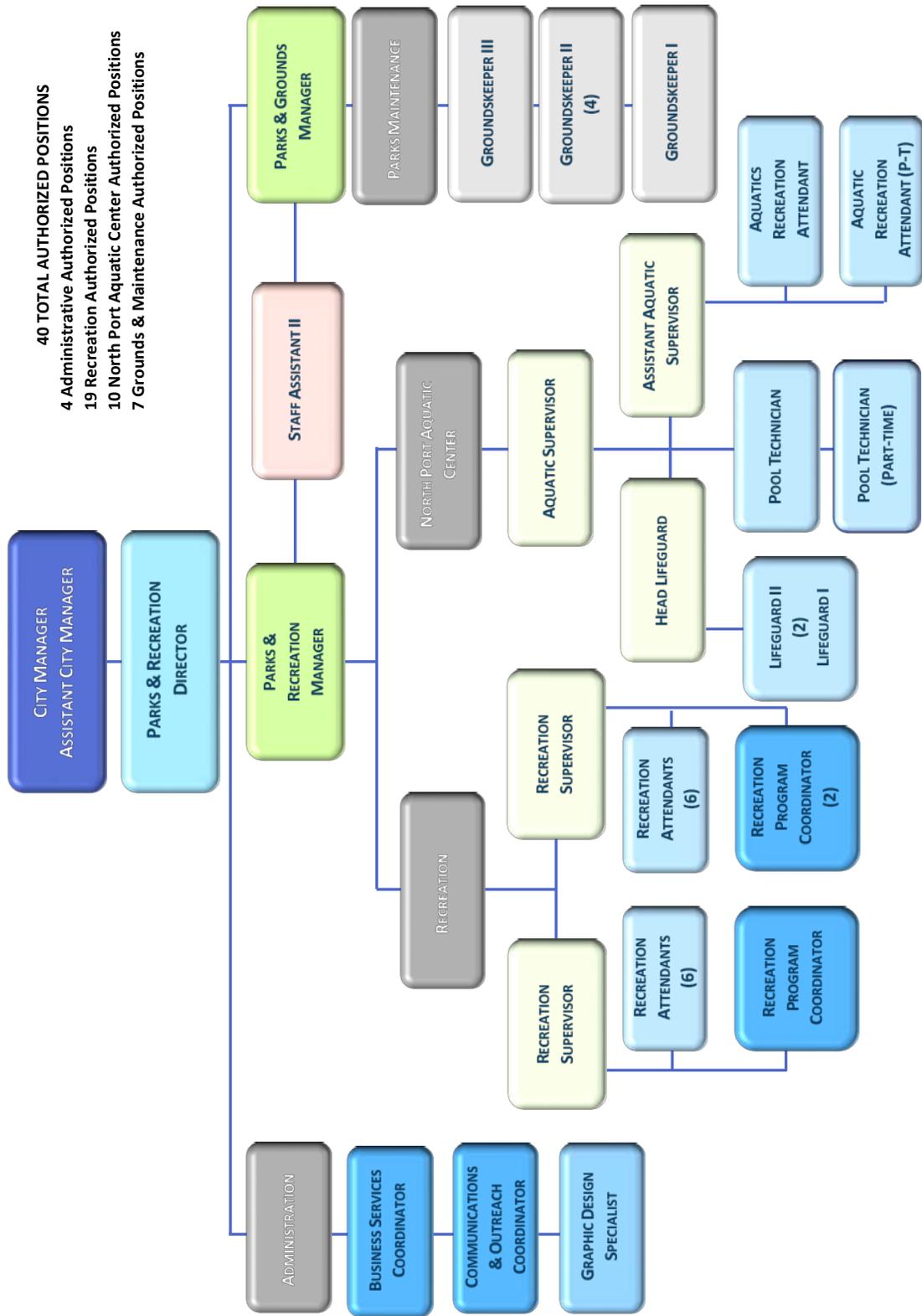
[North Port Aquatic](#) Center is responsible for providing aquatic based recreational opportunities and education in a safe and healthy environment.

[Parks & Recreation Advisory Board](#)

The Parks & Recreation Advisory Board advises the City Commission on parks and recreation matters. The Parks & Recreation Manager serves as staff liaison to this Board which meets monthly, on the third Thursday.

[Parks & Recreation Master Plan](#)

Adopted in January 2018, the Parks & Recreation Master Plan provides the Department with future direction regarding the City's parks, facilities, program and activities.



Police Department

The mission of the North Port Police Department is to provide the community with the highest level of law enforcement and crime prevention possible and to: protect life and property; preserve the peace; prevent, reduce, and deter crime and the fear of crime; enforce the law fairly; protect individual rights; and, to provide a safe and secure environment for all citizens.

In order to accomplish this mission, the Police Department will aggressively pursue crime prevention, crime suppression, investigative and community-oriented programs. Our mission includes the creation of partnerships within the community we serve to secure and promote safety for all residents and visitors.

LOCAL

Police	941) 429-7300
Tip411	Google Play Store/App Store
North RePort App.....	Google Play Store/App Store
Text NPPD	847-411
Crime Tip Line	(941) 429-7382

STATE AND NATIONAL

Safe Place and Rape Crisis Center (SPARCC) 24/7 Hotline	(941) 365-1976
State Attorney’s Office, Victim’s Rights	(941) 861-4449
Parents of Murdered Children	(941) 952-0936
Florida Abuse Hotline (Elderly and Children).....	1-800-962-2973
Identity Theft Hotline.....	1-866-966-7226
Statewide Crime Victim Information and Referral	1-800-226-6667
National Center for Victims of Crime.....	1-800-394-4357

Police Department Overview

The North Port Police Department serves the City with a total of 117 sworn police officers, and 40 assigned to three Bureaus: Patrol, Support Services, and Special Services.

Office of the Chief - Budget

The Department Business Manager is responsible for preparing, processing and administering the annual operating and capital improvement project budgets.



Office of the Chief - Professional Standards

The Professional Standards Bureau is commanded by a captain. He is responsible for investigating complaints against agency members for policy and criminal violations. Recruitment also falls under his responsibility.

At the conclusion of each investigation, one of the following findings was determined for each allegation filed against Department employees:

Exonerated: The investigation revealed the acts which provided the basis for the complaint or allegations were justified, lawful, and proper.

Not Involved: Upon investigation, the employee was found to not be directly involved in the acts alleged.

Not Sustained: The investigation failed to disclose sufficient evidence to clearly prove the allegation made in the complaint.

Sustained: The investigation disclosed sufficient evidence to clearly prove the allegation made in the complaint.

Unfounded: The investigation conclusively proved that the allegations made in the complaint did not occur.

The Department also keeps a close watch on Use of Force incidents.

Office of the Chief - Accreditation

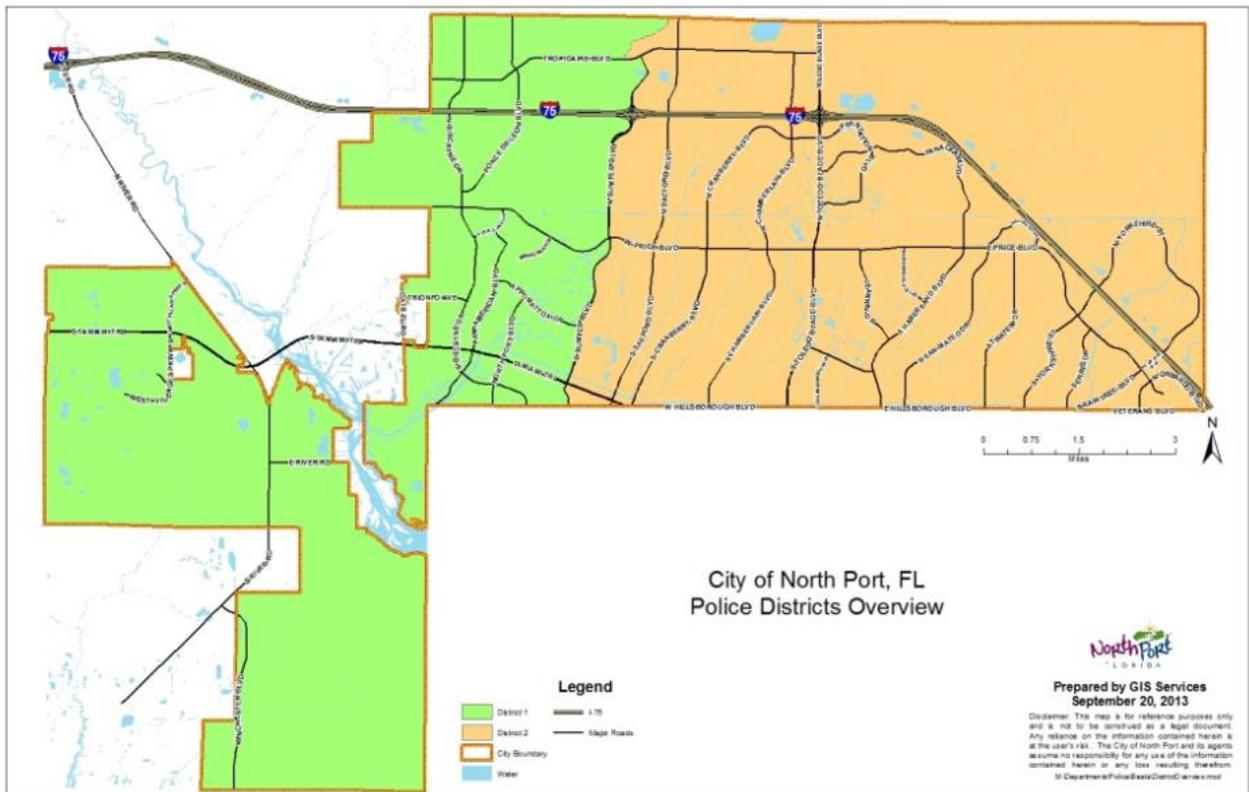
An accreditation program has long been recognized as a means of maintaining the highest standards. The Department has been accredited since 2000. The North Port Police Department is one of a select group in the state, having achieved reaccreditation at Excelsior level, the highest accreditation achievement. The Accreditation Coordinator is also responsible for the Department Volunteer program.

CITIZEN VOLUNTEER PROGRAM

PPD volunteers aid in the overall efficiency of the organization by supplementing and supporting Department personnel. Volunteer roles may include performing general office duties, and clerical support.

Patrol Bureau

Patrol is the largest bureau in the department and is divided into four (4) patrol divisions each of which is commanded by a Police Commander and two Sergeants. Each division is responsible for patrolling the 100-plus square miles that make up the City of North Port. The divisions currently work 12-hour shifts and are instrumental in providing for a safe community. The K9 unit and Special Enforcement Team (SET) are also under the Patrol Bureau.



K-9 UNIT

The Department's Canine (K-9) Unit is staffed by two officers and two K-9s. The K-9 teams maintain their certification by conducting regular training in the areas of drug detection, building/area searches, tracking, and apprehension of subjects.

SPECIAL ENFORCEMENT TEAM

The Special Enforcement Team (SET) consists of a total of 3 officers who operate on an as-needed basis under the leadership of a Sergeant. This unit is reactionary to community needs, quality of life and/or crime trends.

Special Services Bureau

A captain oversees the Special Services Bureau. Two commanders serve under him, one in command of the Criminal Investigation Division, which is further divided into Persons Crimes, Property Crimes, and Special Investigations Units, each led by a Sergeant. The other Commander leads the Special Operations Division, divided into Training, and School Resource Units each under the supervision of a Sergeant.

TRAINING UNIT

The Training Unit is responsible for the training, certification, and recertification of all sworn and civilian personnel.

SCHOOL RESOURCE OFFICERS

NPPD has six School Resource Officers serving a total of five public schools with nearly 5,400 students.

COMMUNITY POLICING OFFICER

The Community Policing Officer focuses on crime prevention and community presence. He is also the supervisor of our Volunteer Service Aides.

POLICE EXPLORERS PROGRAM

The program is a “Learning for Life” program in which youth, ages 14 – 20 years old participate in “Exploring” different career fields. For more information, please contact Sergeant Tony Donohew at tdonohew@northportpd.com.

Support Services Bureau

The Support Services Bureau made up entirely of civilians is under command of a Civilian Commander. Support Services includes Records, the Forensics Unit, and Telecommunications.

RECORDS UNIT

The Records Unit consists of one Records Supervisor and four Records Technicians. Records is responsible for the processing and dissemination of reports written by personnel within the Police Department.

CRIME SCENE UNIT

The Crime Scene Unit is staffed by one Supervisor and three Crime Scene Investigators. The Unit’s responsibilities include documenting and photographing crime scenes, as well as identifying, processing, and preserving evidence. This year, the unit partnered with Parks and Recreation to present the first “Camp CSI”, that provided children ages 11 – 14 exposure to Crime Scene procedures. The Forensics Supervisor also supervises the Property and Evidence Unit.

PROPERTY AND EVIDENCE UNIT

The Property and Evidence Unit is responsible for the handling and storage of evidence obtained from various crimes and temporary storage of found property. The Unit consists of one Evidence Technician who is responsible for the custody and control of 30,500 pieces of property and evidence.

COMMUNICATIONS

The Communications Section is the lifeline for police officers. The Section is comprised of four Supervisors, and 9 full-time Public Safety Telecommunicators. They work around the clock 24/7 365

North Port Police Statistics

- Number of employees: 117 Sworn, 40 Civilian
- Pieces of Property/Evidence Stored: 30,256 as of August 31, 2018.
- Contacts with Citizens (Interactions) January 1 – August 31, 2018 : 24,259. This is all calls for service less Park/Walk/Talk, Patrol Checks, and Hot Spot Patrols.
- Citizen Calls for Service January 1st – August 31, 2018: 17,306

Crashes by Year/Month

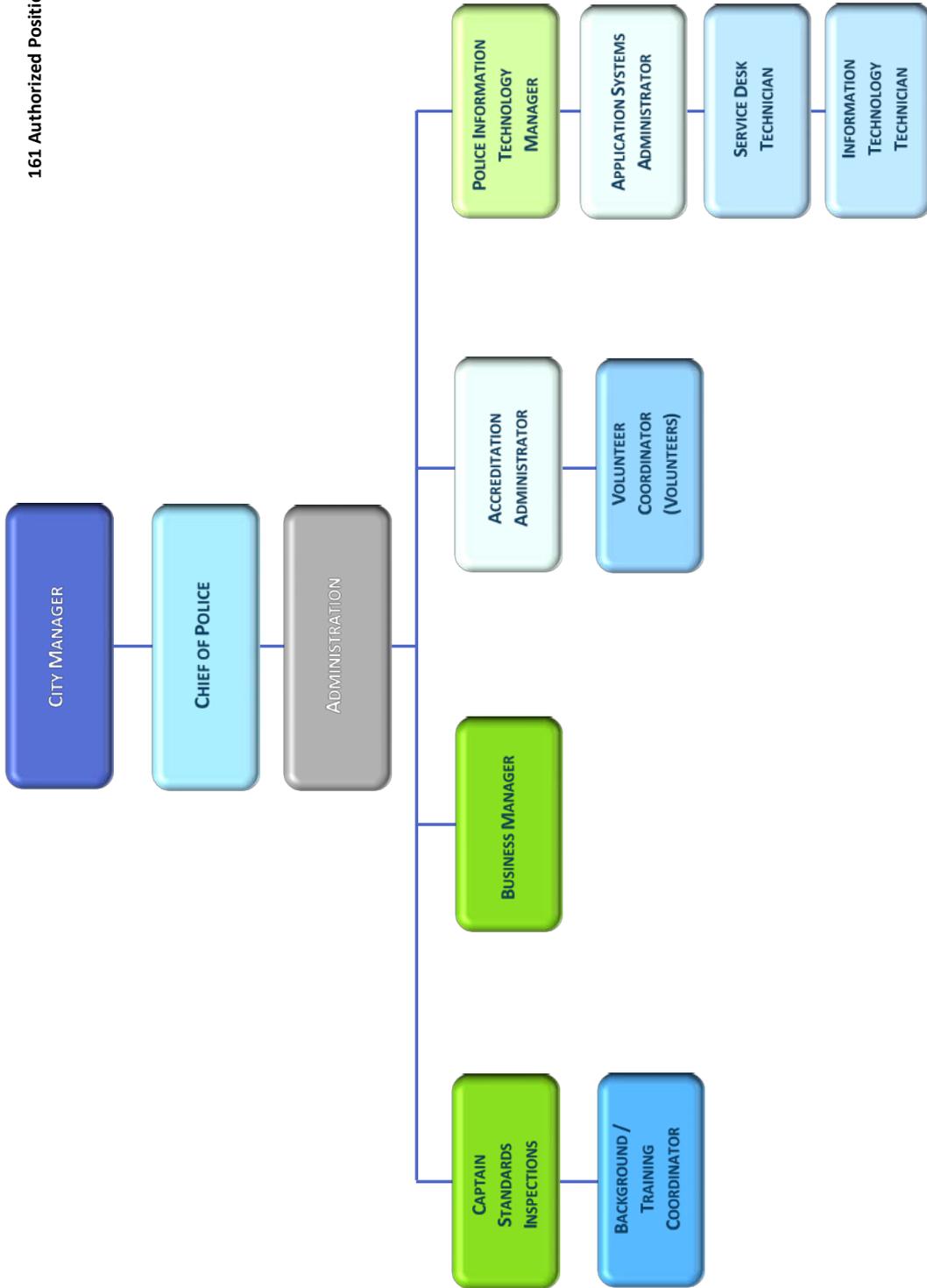
Month	2015	2016	2017	2018	Grand Total
January	105	110	92	111	418
February	98	119	103	127	447
March	99	98	133	133	463
April	94	104	100	103	401
May	99	106	95	123	423
June	82	94	97	66	339
July	94	83	101	95	373
August	107	120	78	98	403
September	115	113	117		345
October	96	108	120		324
November	100	108	116		324
December	100	113	131		344
Grand Total	1189	1276	1283	856	4604

Top 10 Crash Locations

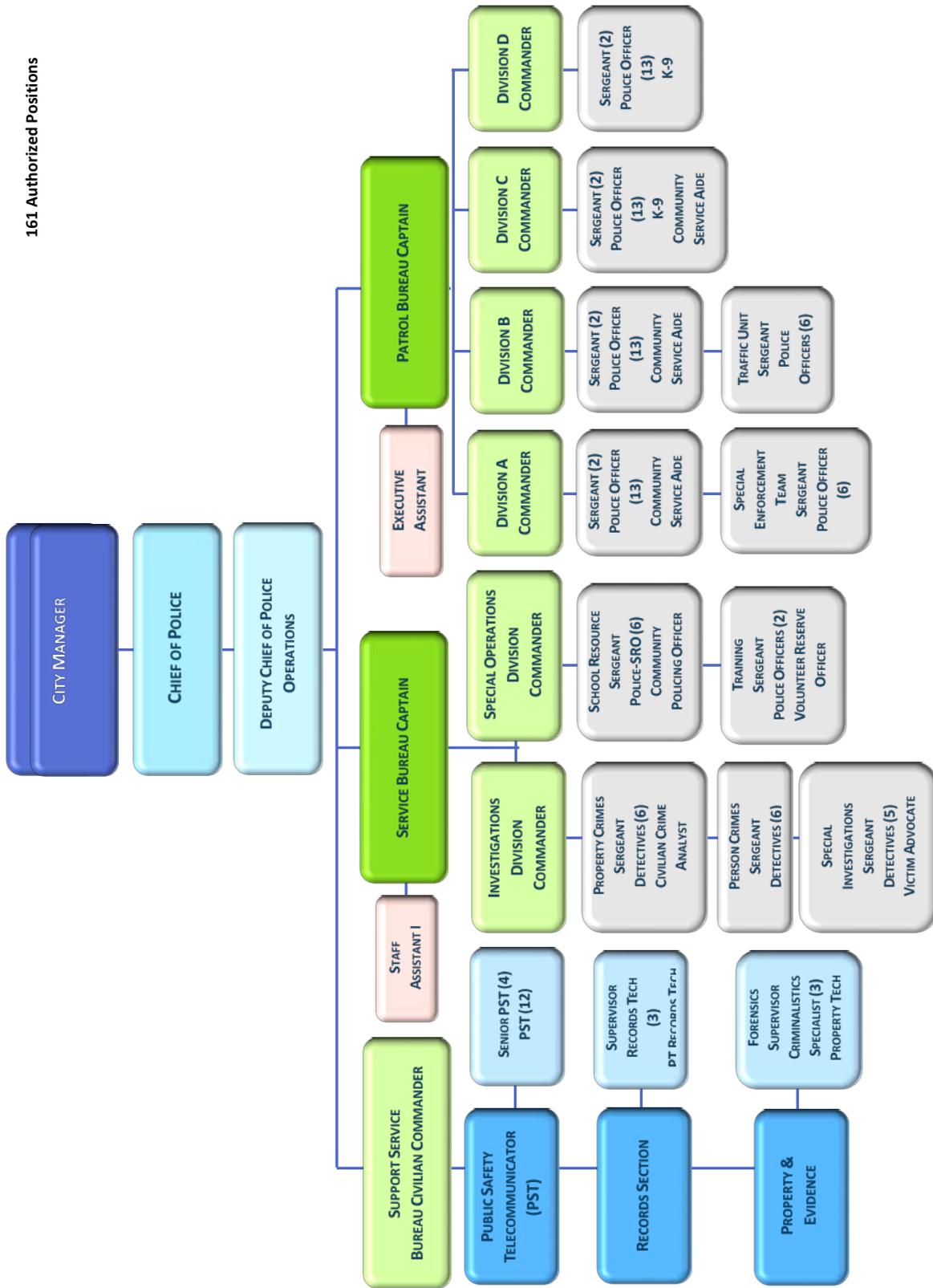
Location	2015	2016	2017	2018
TAMIAMI TRL/S SUMTER BLVD	37	23	18	34
TAMIAMI TRL/SUMTER CROSSING DR	10	16	13	19
TAMIAMI TRL/S SALFORD BLVD	17	21	18	13
TAMIAMI TRL/S BISCAYNE DR	19	6	12	12
TAMIAMI TRL/NORTH PORT BLVD	13	17	13	11
S SUMTER BLVD/TAMIAMI TRL	11	12	7	11
S SALFORD BLVD/TAMIAMI TRL	14	4	7	9
S TAMIAMI TRL/GALLERIA BLVD			2	7
TAMIAMI TRL/TUSCOLA BLVD	7	13	15	7
S TAMIAMI TRL/CORRADINO BLVD	2	2		7

	Year-To-Date				
Part 1 - Violent	3 Yr Avg	2017	2018	Prev Yr % CNG	3Yr % CNG
Homicide	0.7	0	2	200%	200%
Sex Offenses	12.7	14	32	129%	153%
Robbery	7.0	6	11	83%	57%
Aggravated Assault	44.0	54	35	-35%	-20%
Total	64.3	74	80	8%	24%
Part 1 - Non-Violent	3 Yr Avg	2017	2018	Prev Yr % CNG	3Yr % CNG
Burglary	95.7	69.0	101	46%	6%
Larceny	429.0	402.0	642	60%	50%
MV Theft	19.3	15.0	24	60%	24%
Total	544.0	486.0	767	58%	41%
Combined Total	608.3	560.0	847	51%	39%
Cases Cleared	33.9%	38.8%	36.0%	-7.1%	6.2%

161 Authorized Positions



161 Authorized Positions



Public Works Department

The mission statement of the Public Works Department is to efficiently maintain the public infrastructure and provide services to ensure the safety, health and well-being of our customers. The Public Works Department is responsible for maintaining the safe and efficient passage of traffic on the City's 822 miles of roads, bridges, sidewalks and bikeways. It is also responsible for maintaining and repairing storm drains, canals and other water control structures to protect homes and infrastructure from standing or flowing stormwater. Public Works also ensures the integrity of the potable water supply for customers whenever water is withdrawn from waterways for potable water uses. The department also maintains the City's fleet, which includes over 650 vehicles and pieces of equipment. Public Works is also responsible for the collection of residential and commercial garbage, recycling and yard waste.

The Public Works Department is comprised of five separate Divisions which perform services for the residents of North Port. Each Division Head reports directly to the Public Works Director. There is a link to our Organizational Chart at the bottom of this page for further information.

There are three (3) Divisions which receive their funding through the Road and Drainage District: 1) Administration Division; 2) Operations and Maintenance Division; and 3) Engineering Division. The Fleet Management Division is internally funded by all City Departments. The Solid Waste Division receives funding through the Solid Waste District. The Facilities Maintenance section receives funding through the General Fund.

Administration Division

Provide administrative support to the Operations and Maintenance Division, Solid Waste Division, Engineering Division and Fleet Management Division in the following areas:

- Purchasing - requisitions, invoices and payments
- Budget preparation and administration
- Community Outreach
- Customer Service
- Mapping and Software Management
- Document filing and maintenance
- City Commission staff summaries, agendas and action reports
- Administrative Regulations and Standard Operating Procedures
- Personnel matters

Engineering Division

Technical Section:

- Engineering design, analysis, inspections, and management of capital and maintenance projects

- Staff Development Reviews, right-of-way use permits, storm water management, and contract management

Infrastructure Management Section:

- Infrastructure inventory and condition assessment
- Integrated computer Asset Management System
- Planning, estimating and scheduling maintenance work and projects
- Plans review and inspections of road projects and stormwater drainage projects

Operations and Maintenance

Roads, Waterways and Structures Section

- Maintenance of roadways, including pothole patching
- Maintenance of traffic control devices (traffic signals, signs and markings)
- Maintenance of sidewalks and related pedestrian bridges
- Maintenance of mowing, landscaping and debris removal within the public right-of-way
- Maintenance of water control structures and bridges
- Maintenance of aquatic weeds in canals and ditches
- Maintenance of canal and ditch banks within the right-of-way

Drainage Section

Maintenance of stormwater drainage systems (pipes, inlets, swales, ditches, and canals)

- Planning, estimating and scheduling maintenance projects

Facilities Maintenance Section

- Maintains the groundskeeping of various City owned facilities
- Provides maintenance and repair to over 25 buildings citywide
- Plays a pivotal role in City operated events. Assists in planning, set up, working the event and post event cleanup.

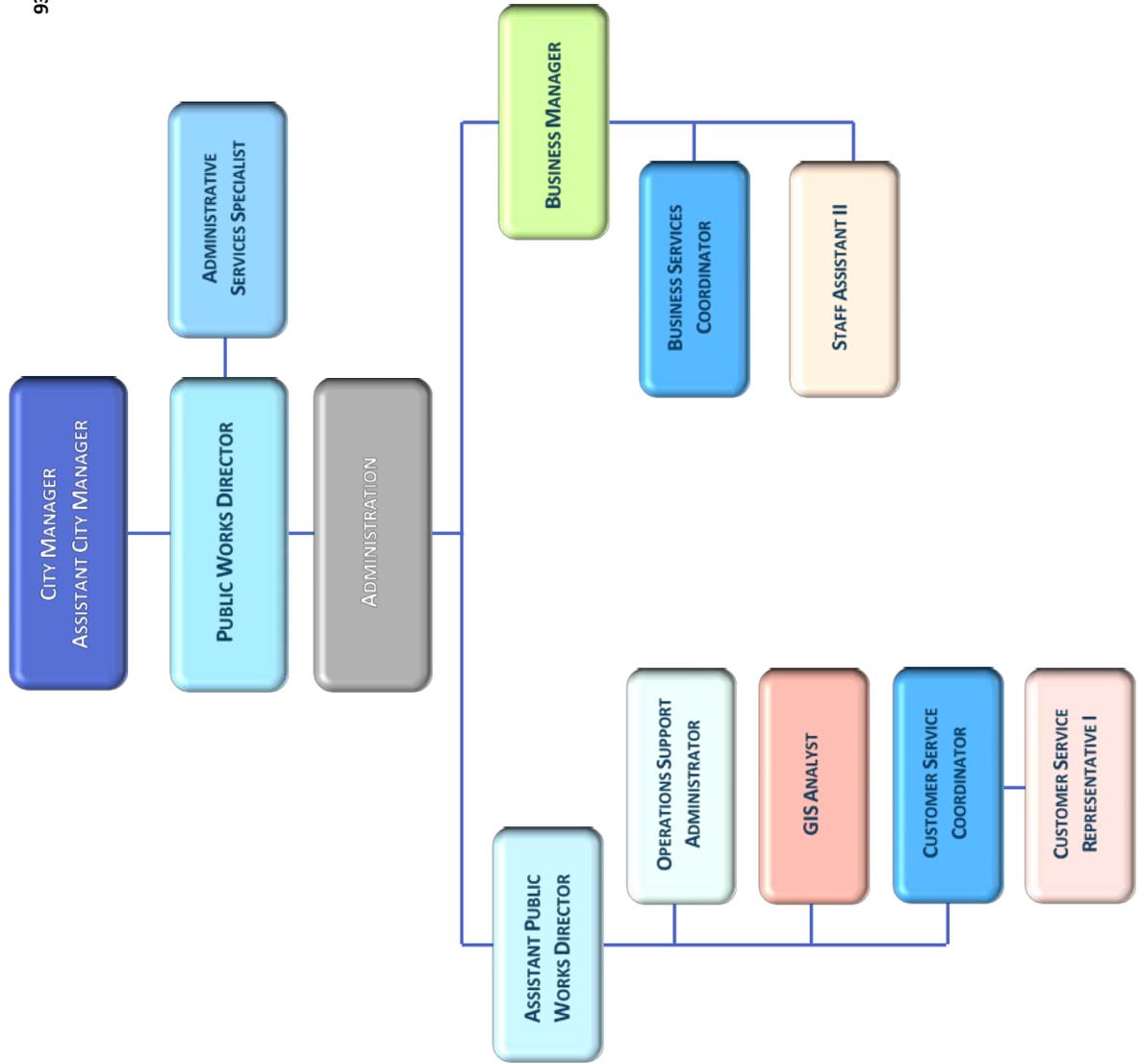
Fleet Management

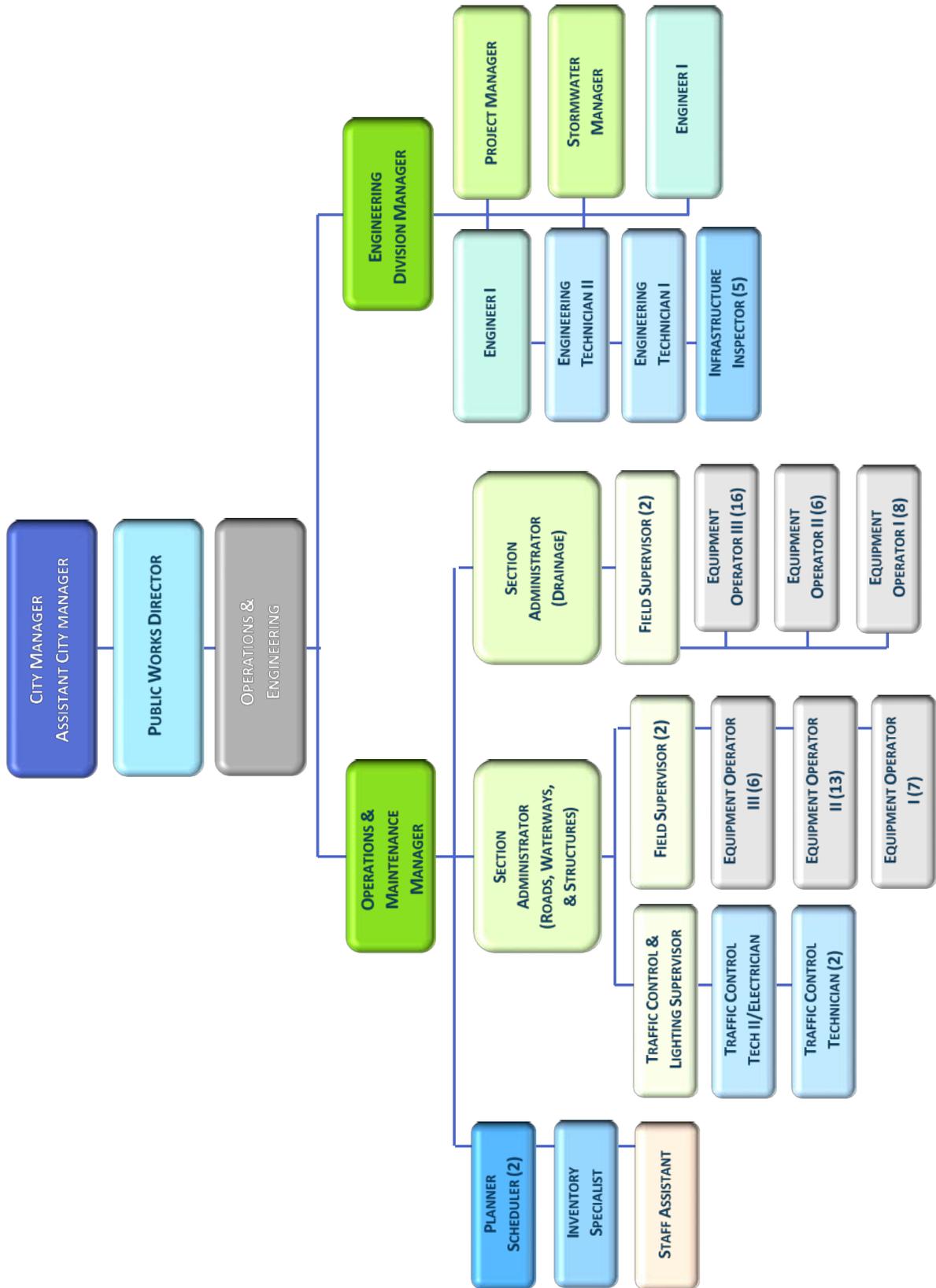
- Repair and maintain the City's vehicles and equipment
- Recommend, procure, and deliver the City's rolling stock
- Develop, implement and administer City's vehicle replacement and use policies
- Administer the fueling system for vehicles and equipment

Solid Waste

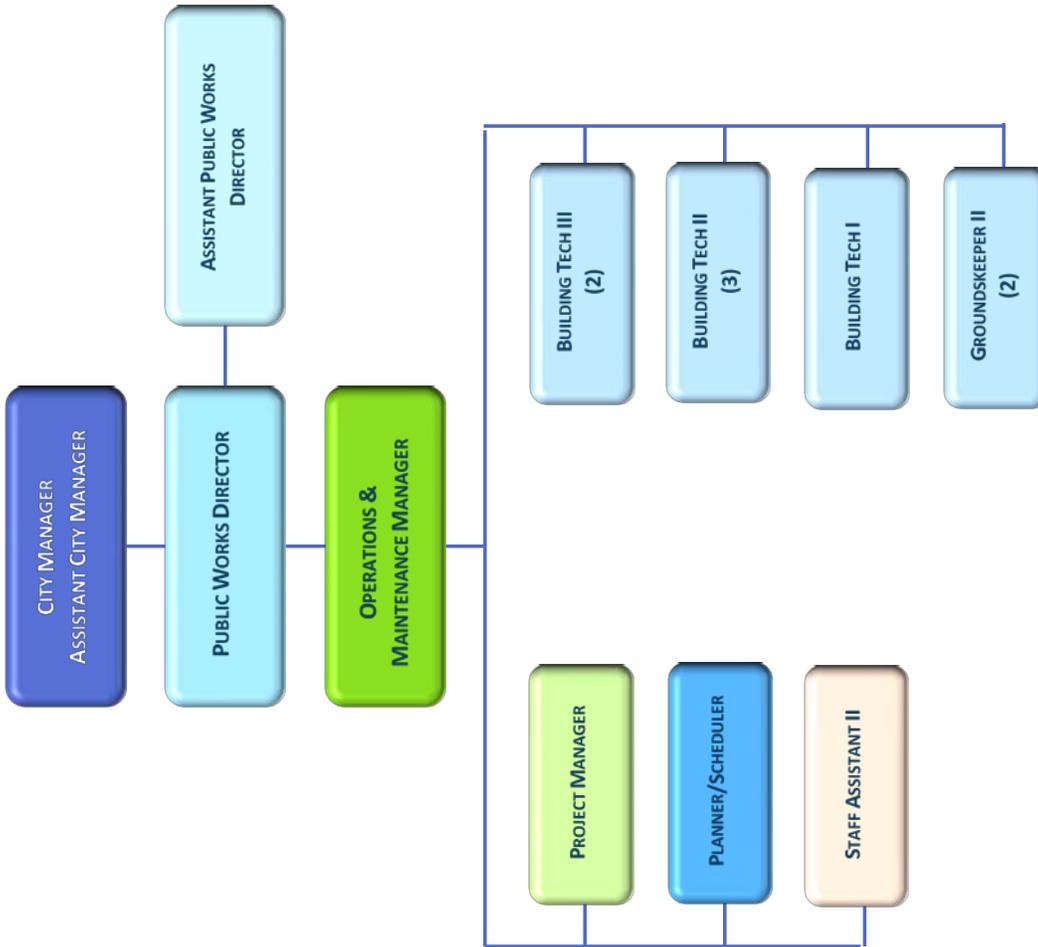
- Once a week collection of residential solid waste and yard waste
- Once a week collection of recyclable material, with the material type rotating
- Special collection of residential bulk waste
- Daily/weekly collection of commercial solid waste, recyclable material and yard waste
- Delivery and maintenance of solid waste containers
- Delivery and collection of dumpsters and rolloff containers to residential customers

93 Authorized Positions

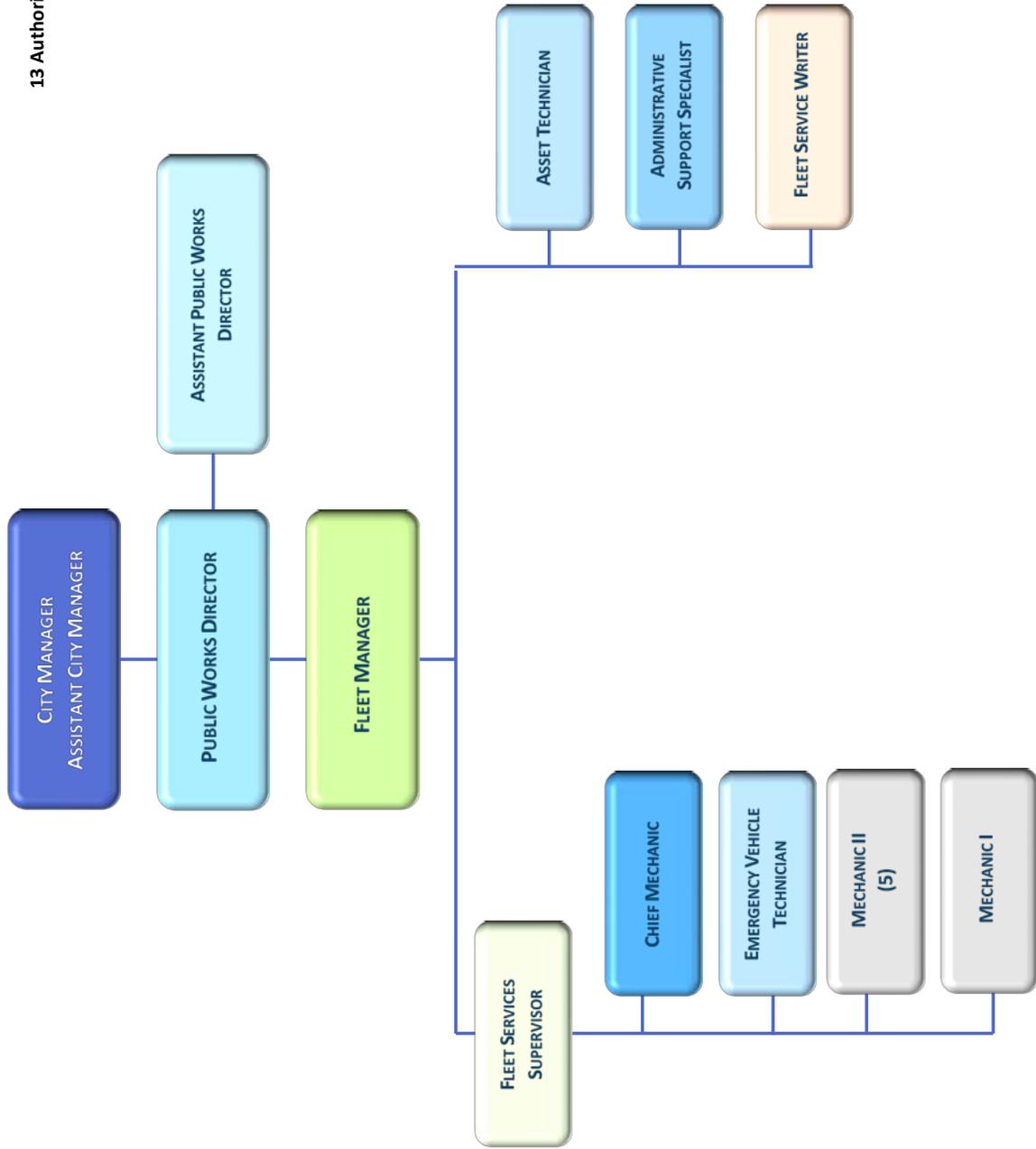


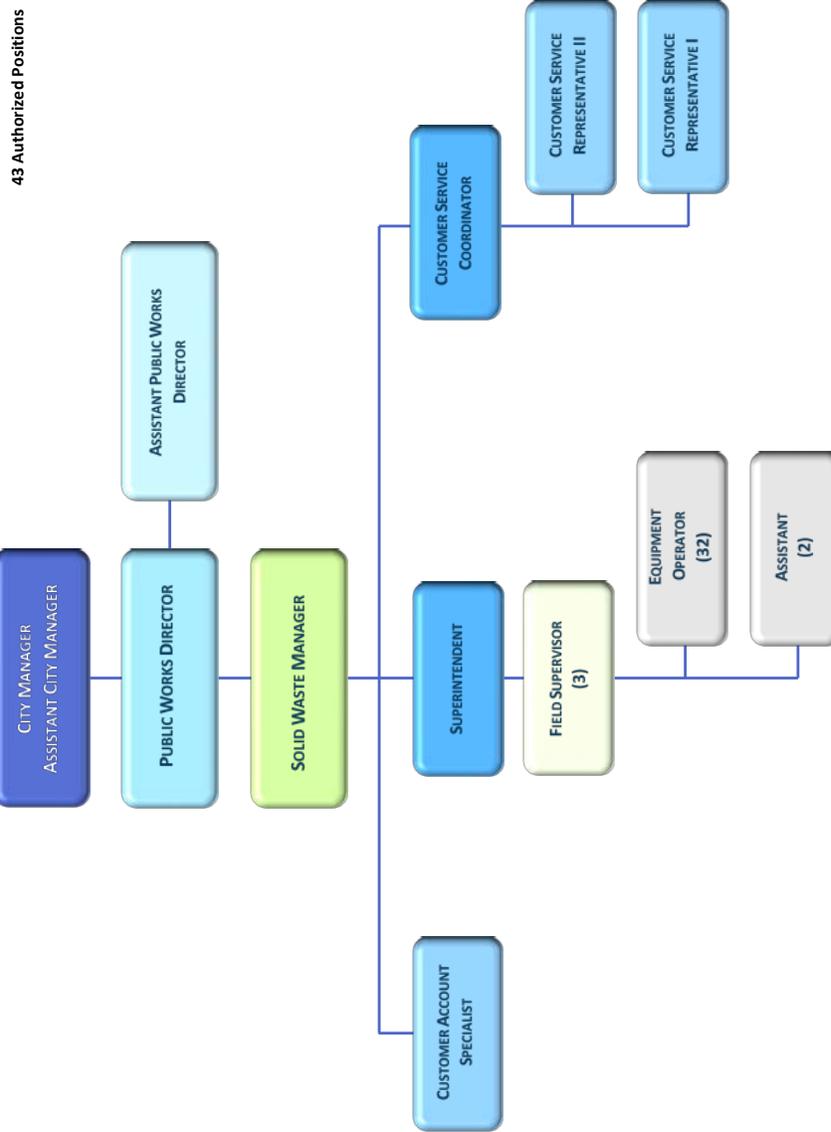


11 Authorized Positions



13 Authorized Positions





Social Services Division

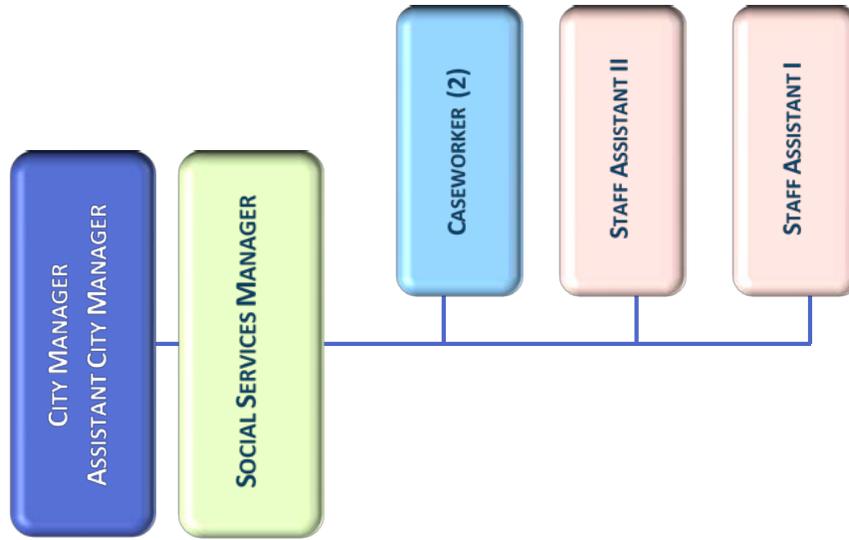
Social Services is a division within the City Manager’s Office and was established in 1980 to assist families and individuals in need of short term financial assistance. The mission is to ensure the availability, awareness, and accessibility of programs and resources in the community, and to assist families and individuals while improving their overall quality of life. Social Services is a 501c tax-exempt governmental entity funded by the City of North Port. Additional funding sources are received through grants, generous individuals, churches, civic groups, schools and collaborative partners. These charitable funding sources, collaborative partners, and other outreach programs enable the Division to provide assistance to families and individuals that are experiencing a short term unforeseen financial crisis.

The Division hosts three annual events during the year to assist local families by providing them with resources. This includes a Community Baby Shower & Pre-School Expo every April; a Back to School Resource Fair every August; and a Home for the Holidays Program every winter.

In addition, the Division provides financial assistance to families in a short-term crisis, including assistance with utility bills, mortgage, rent, and more. Some services are provided to North Port residents only. To receive those services, proof of residency must be shown in the form of a North Port Utilities bill, an FPL bill, a mortgage statement, or a rental lease.

The City of North Port’s Social Services is now an ACCESS POINT through The Suncoast Partnership to End Homelessness to assist individuals and families experiencing homelessness in North Port. The Suncoast Partnership to End Homelessness was formed by community leaders from Sarasota and Manatee Counties in 2005, with the vision of ending homelessness in the region.

5 Authorized Positions



Utilities

North Port Utilities' mission statement is to support the City's mission by continuing to provide our customers quality water and sewer services in a safe, healthful, cost-effective and efficient manner and to accommodate the growth of the North Port community through the planned expansion of its systems.

The City of North Port Utilities Department operates 24 hours a day, seven days a week, to provide and distribute a reliable supply of quality, safe drinking water and a wastewater collection system that meets the needs of its customers and respects and enhances the environment. The City has more than 22,000 connections that service approximately 51,000 customers in the City of North Port and unincorporated Sarasota County.

Administration

The Administration Division provides support services and direction for operating all divisions within the Utilities Department. The division is responsible for program direction, planning, personnel matters, financial management, customer assistance, community outreach, billing, cashing and clerical support for the operations and maintenance of the City's utilities. The Utilities billing, cashing and customer service functions are centralized at North Port's City Hall location, while the community outreach, clerical support for other divisions, field related customer service and departmental administrative functions are located at the Price Boulevard office.

Engineering

The Engineering Division is responsible for the oversight of planning, design and construction of Utilities projects. Engineering also manages Utilities GIS and mapping systems, infrastructure inspections for development, and utility locates to ensure that the City's infrastructure is identified prior to excavation to prevent damage during construction. Engineering staff work closely with staff from Field Operations as well as the plants to make sure that our operations are keeping pace with the demands of the City's growth and development. In addition to the above, Engineering staff is responsible for inspecting all new construction of water and sewer lines which will be dedicated to the City.

Water Treatment

The Water Treatment Division operates a Class B conventional surface water treatment plant drawing water from the Myakkahatchee Creek and the Cocoplum Waterway, as well as a Reverse Osmosis plant which treats ground water from six production wells. Operators treat water from both systems to produce a blended water which is sent to the City's potable distribution system. Water plant operators also monitor and operate the City's three booster stations which help maintain system flows, pressure and water quality as it makes its way to the City's customers. The water treatment system includes 7.5 million gallons of storage among 5 tanks at the Myakkahatchee Creek Water Treatment Plant and two of the City booster stations. The completion of the Aquifer Storage and

Recovery Well Project will create additional storage capacity for the City to store water during North Port's rainy season for later use during drier periods.

Wastewater Treatment

The wastewater treatment plant operators are responsible for the maintenance and operation of the wastewater treatment plant. The City has relied upon the wastewater plant for a safe, reliable, environmentally sound means of treating sewage and providing reclaimed water through the system since 1960. Wastewater treatment plant staff continually monitors demand within the system and makes sure the availability of the City's reclaimed water sources meets the demand. In conjunction with monitoring demand, staff continually samples wastewater and reclaimed water throughout the system on daily, weekly and monthly schedules that are analyzed for quality and monitor the deep injection well.

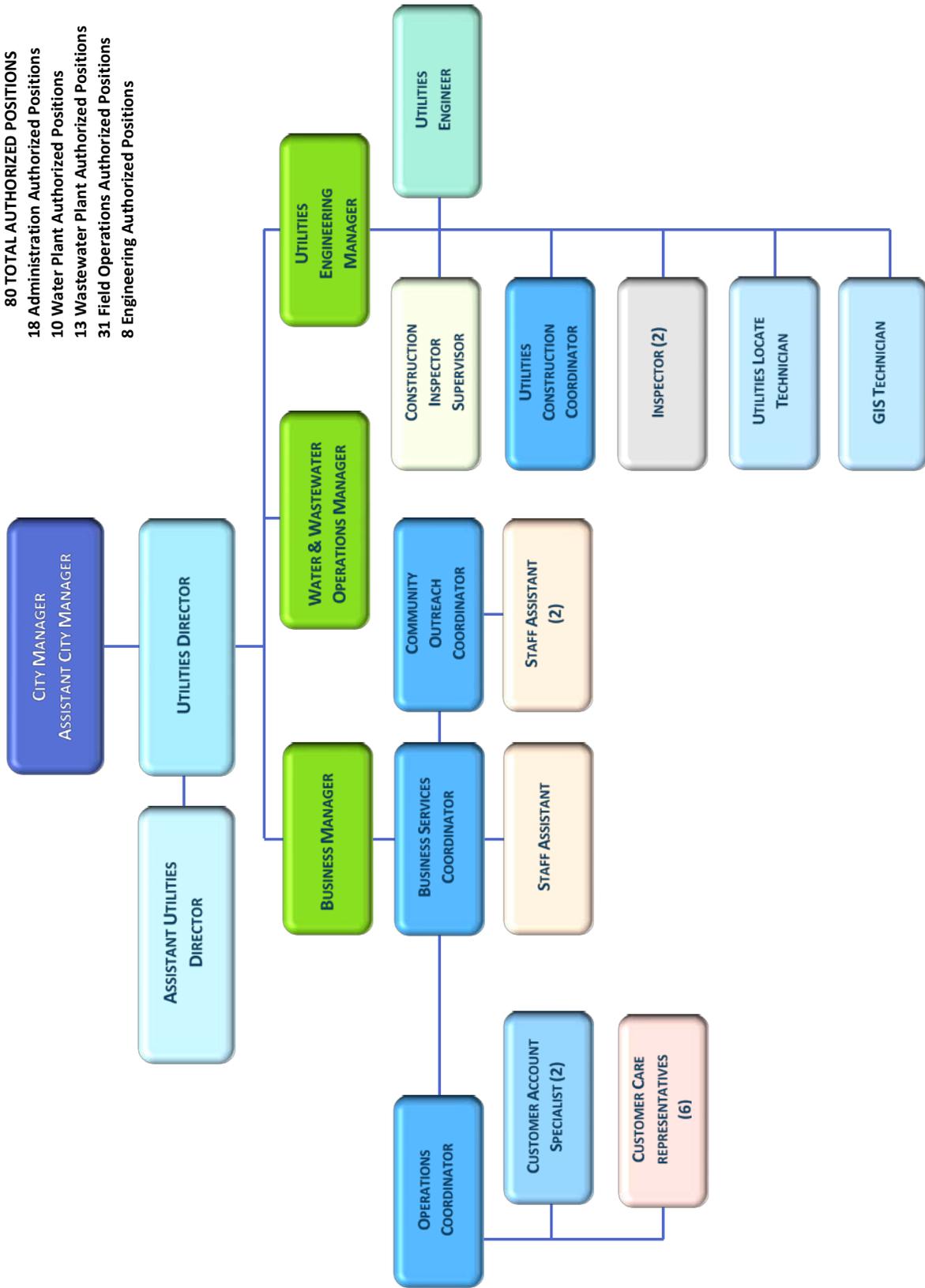
Field Operations

The Field Operations Division currently oversees the maintenance, repair and operations of over 320 miles of potable water distribution and transmission lines, approximately 150 miles of wastewater gravity collection lines, and 80 miles of wastewater force mains, 110 wastewater lift stations, approximately 2,000 fire hydrants, over 3,700 valves, and over 3,500 manholes. Operations include the daily inspections and maintenance of lift stations, service installation and meter replacements, the reading and testing of all meters, repair of water and sewer main breaks, all hydrant installation and all hydrant servicing and replacement, all new sewer connections, valve replacements, cleaning of lines, the cross connection and backflow prevention program, the inflow and infiltration program and the response to all service related customer concerns.

Field Operations also supports the water treatment and wastewater treatment facilities by maintaining major pumps and equipment and overseeing construction.



80 TOTAL AUTHORIZED POSITIONS
 18 Administration Authorized Positions
 10 Water Plant Authorized Positions
 13 Wastewater Plant Authorized Positions
 31 Field Operations Authorized Positions
 8 Engineering Authorized Positions



CITY BUDGET



BUDGET POLICIES

Purpose

These policies establish the fundamental guidelines for the development of the annual budget for the City of North Port Florida. The budget procedures are designed to provide a uniform method and set of instructions to the City Departments for the efficient preparation of the budget. The overall goal of the City's financial plan is to establish and maintain effective management of the City's financial resources.

Policies and Strategies

Policy

The City's annual budget will be developed in accordance with the policies and priorities set forth in the comprehensive plan, City Commission goals, the needs of the community, and federal and state laws.

Scope – Comprehensiveness

Policy

The City Manager shall submit an annual Operating and a Five-year Capital Improvement budget to the City Commission covering the next fiscal year. The budget will contain the following information:

1. A letter from the City Manager discussing the proposed financial plan for the next fiscal year, a review of the previous year's activities, and the current financial condition of the City.
2. Proposed capital, operations and maintenance, and debt service expenditures by fund and department, and type of expenditure for the budget year, along with comparisons to the current year adopted budget and actual expenditures for three prior years.
3. Proposed revenues, by source for the budget year, along with comparisons to the current year adopted budget and actual revenues for three prior years.
4. A table of organization with proposed staffing levels by fund and department, along with comparisons to staffing levels for the current year and three prior years.
5. A summary of designated fund balances for each governmental and enterprise fund.

Scope – Budget Form

Policy

The City of North Port's operating budget will be developed on an annual basis. Appropriations will be approved by the City Commission. The annual operating budget will be presented in a fund and department budget format. The purpose of this format is to clearly outline the major funds and service areas and the associated expenditures.

Scope – Basis of Budgeting

Policy

The annual budget balances operating expenditures with operating revenues. The City budgets for governmental funds, which include the General Fund, Special Revenue Funds and Capital Funds, are based on the modified accrual basis of accounting. Under this method, revenues (income) are recognized in the period they become measurable and available to finance expenditures of the period and expenditures (expenses) are recorded when incurred with the exception of principal and interest on long-term debt, which are recorded when due.

Scope – Budget Calendar

Policy

The City budgets resources on a fiscal year, beginning October 1st and ending on the following September 30th.

Budget packages for annual preparations will be distributed to City departments no later than April 15th each year. Departments and elected officials shall return proposed budgets no later than June 10th each year for City Manager review.

Prior to August 1st each year, the City Manager shall present a recommended City budget to the City Commission for the fiscal year commencing October 1st. City Commission shall review the City-wide budget and workshops will be conducted.

The budget will be adopted in compliance with requirements in the City's Charter and according to Florida State Statutes which includes a set timetable as required under the Truth in Millage (TRIM) Act.

Prior to September 1st, the City Manager shall submit a Commission Proposed operating budget to the Commission for the fiscal year commencing October 1st.

Two public hearings will be conducted in September to obtain taxpayer comments.

The budget and related millage rate and special assessment levies will be legally enacted by ordinance or resolution by September 30th.

Balanced Budget

Policy

All funds are required to balance. As such, total anticipated revenues will equal the sum of budgeted expenditures for each fund. Revenues are derived from four sources: current revenue charges; increases in existing revenue charges; new revenue sources; and unallocated reserves carried forward from prior years.

Budget Control and Monitoring

Policy

Budgetary control ensures that actual expenditures do not exceed appropriations as adopted by the annual budget ordinances. Legal budgetary control is maintained at the fund level. Transfers of appropriated moneys between departments and/or functions within an individual fund shall be authorized by the City Manager, excluding the authorization of additional regular positions or the modification of the intent of the Capital Improvement budget. Department directors and managers are accountable for monitoring revenues and expenditures related to the department's core business activity and monitoring for expenditures over budget.

Budget Amendments

Policy

Budget adjustments that would increase total expenditures of a budgetary fund or would transfer money between funds require City Commission approval. This process is referred to as amending the budget. Budget amendments begin as a recommendation of the Commission or City Manager. The Budget Office prepares all budget amendments presented to Commission for consideration.

Budget Year-End

Policy

In August, the Finance Director sends out a memo to all departments listing the year-end procedures and deadlines. Part of the year-end procedures is project and purchase order year-end rollovers.

Commonly Used Budget Terms

Ad Valorem Tax – Commonly referred to as “property tax.” This is the tax levied on both real and personal property. The tax is calculated by multiplying the millage rate (set by the taxing authority) by the taxable value of the property.

Adopted Budget – Revenues and appropriations approved by the City Commissions for the next fiscal year.

Amended Budget – The Adopted Budget that has been formally amended by the City Commission.

Assigned Fund Balance – A portion of fund balance that reflects a government’s *intended* use of resources. Such *intent* would have to be established at either the highest level of decision making, or by a body or an official designated for that purpose.

Budget – A plan of financial activity for a specified period of time that indicates all planned revenues and expenditures for the specified period.

Budget Amendment – A procedure allows for revising a budget appropriation.

Budget Hearing – As required by law, the City Commission conducts two public hearings to receive and consider input from the public and to propose and adopt a millage rate and the annual budget.

CIP – Capital Improvement Program – A five-year financial plan for construction of physical assets such as buildings, streets, sewers and recreation facilities. The plan extends over several future years indicating the beginning and ending date of each project, the amount to be expended in each year and the method of financing those expenditures.

Enterprise Fund – Activities of government that are operated and accounted for as businesses. Enterprises rely principally on revenue derived from user fees to fund operations. In the City of North Port, the North Port Utilities is the sole enterprise operation.

Expenditure – Decrease in net financial resources. Expenditures include operating expenses, capital expenditures and debt service payments that require current or future use of current assets.

Fiscal Year – Any period of 12 consecutive months designated as the budget year. The City’s fiscal year begins October 1 and ends September 30, the same as the Federal Government.

General Fund – Used to account for all governmental functions not required to be separately recorded by laws or governmental policy. Most of the essential governmental services such as police protection, landscape maintenance, neighborhood services and general administration are provided by the General Fund.

Half-Cent Sales Tax – A tax collected by the State of Florida and distributed to local governments based on the amount of taxable sales within each county.

Impact Fee – A fee imposed on new development as a total or partial reimbursement for the cost of additional facilities made necessary by the growth.

Infrastructure Surtax – A penny tax applied to the first \$5,000 of any single taxable item when sold to the same purchaser at the same time. The tax is restricted to capital improvements and cannot be used for operating expenditures.

Millage Rate – A rate expressed in thousands. As used with ad valorem (property) taxes, the rate expresses the dollars of tax per one thousand dollars (\$1,000) of taxable property values.

Non-Ad Valorem Assessments – Assessments for Special Districts that are not based on property value. The basis for this charge is some other measurable criteria such as per lot, per acre or per residence.

Operating Budget – Plans of current expenditures and the proposed means of financing them. The annual operating budget is the primary means by which most of the financing, acquisition, spending and service delivery activities of a government are controlled.

Proprietary Fund – A group of funds in which the services provided are financed and operated similar to those of a private business. Proprietary fund types used by the City include the Enterprise and Internal Services Funds.

Restricted Fund Balance – A portion of fund balance that reflects resources that are subject to *externally enforceable* legal restrictions. Such restrictions typically are imposed by parties altogether outside the government such as creditors (through debt covenants), grantors, contributors, and other governments (through laws and regulations).

Special Assessment – A compulsory levy made against certain properties to defray part or all of the cost of a specific improvement or service deemed to primarily benefit those properties.

TRIM – Truth in Millage – One of many provisions of state legislation enacted in 1980 to direct taxpayer concerns regarding taxes to the appropriate public bodies. The County property appraiser is required annually to prepare and deliver to each taxpayer a notice of proposed property taxes, known as a TRIM Notice, for the upcoming year.

Unassigned Fund Balance – The general fund, as the principal operating fund of the government, often will have net resources in excess of what can properly be classified in one of the four fund balance categories. If so, that surplus is presented as unassigned fund balance. If resources were not at least assigned, they could not properly be reported in a fund other than the general fund, therefore, only the general fund can report a positive amount of unassigned fund balance. Any governmental fund in a deficit position could report a negative amount of unassigned fund balance.

APPENDIX A

OBSERVED HOLIDAYS



Observed Holidays (City Hall is Closed)

New Year's Day
January 1

Martin Luther King, Jr. Day
Third Monday in January

President's Day
Third Monday in February

Memorial Day
Last Monday in May

Independence Day
July 4

Labor Day
First Monday in September

Columbus Day
Second Monday in October

Veterans Day
November 11

Thanksgiving/Day After
4th Thursday November & 4th Friday in November

Christmas Eve, December 24th
Christmas Day, December 25th

Holidays that fall on a Saturday or a Sunday are recognized either on the preceding Friday or subsequent Monday.

APPENDIX B

CITY ADVISORY

BOARDS AND

COMMITTEES



CITY OF NORTH PORT ADVISORY BOARDS

	MEMBERS	MEETINGS	RESPONSIBILITIES
Art Advisory Board	7 Regular 2 Alternates 2 Youth	2 nd Monday 6:00 pm	Organizes and implements the rotation of an art exhibit within City Hall and the Police Department; recommends the placement of artwork within public places in North Port.
Audit Committee	5 Regular	As requested by the Commission	Provides for auditor selection consistent with Section 218.391 Florida Statutes. (See Ordinance No. 2014-04)
Beautification & Tree/Scenic Highway Committee	7 Regular 2 Alternates 1 Alternate may be a youth 14-17	3 rd Wednesday 1:00 pm	Recommends guidelines & actions relating to the City's general beautification and coordinates with Sarasota County and Florida State agencies regarding highway improvements.
Charter Review Advisory Board	7 Regular 2 Alternates 1 Alternate may be a youth 14-17	At least annually	Reviews the City Charter annually and makes recommendations to the City Commission of proposed amendments which would be subject to referendum.
Citizens' Tax Oversight Committee	7 Regular	Not less than once a year	Reviews the expenditures from the 1% Local Government Infrastructure Sales Tax.
Community Economic Development Advisory Board	11 Regular	At least quarterly	To advise the Commission on business and economic development and issues of importance to the North Port business community and citizens.
Environmental Advisory Board	7 Regular 2 Alternates 2 Youth	TBA	To advise the City Commission on ways to protect, conserve, enhance and raise public awareness of the City's natural and environmental resources, its wildlife habitat, its flora and fauna, and on safeguarding environmental quality for the future.
Historic and Cultural Advisory Board	7 Regular	TBA	Serves as an information resource regarding ways to protect, conserve, preserve, enhance, and raise public awareness of the City's historic and cultural resources.
Joint Management Advisory Board	1 North Port Citizen 1 Sarasota County Citizen The NP High School Principal The NP City Manager or designee	Meet as dictated (at least once a year)	Serves to foster cooperation between the City of North Port and the School Board of Sarasota County for the cooperative management of the North Port Performing Arts Center located at the North Port High School. The composition of this Board is unique. See City Clerk for specific qualifications.
Municipal Firefighters Pension Trust Fund <u>Financial Disclosure Required</u>	2 Firefighters 2 Residents 1 Board Appointee	Quarterly	Determines eligibility, participation, retirement allowances, rules & procedures of the Pension and reviews actuarial studies and valuations of the Fund.
Municipal Police Officers Trust Fund <u>Financial Disclosure Required</u>	2 Officers 2 Residents 1 Board Appointee	Quarterly	Determines eligibility, participation, retirement allowances, rules & procedures of the Pension and reviews actuarial studies and valuations of the Fund.
Parks & Recreation Advisory Board	7 Regular 2 Alternates 2 Youth	3 rd Thursday 6:30 pm	Makes recommendations to the Commission regarding issues related to City parks and recreation.
Planning & Zoning Advisory Board <u>Financial Disclosure Required</u>	7 Regular 2 Alternates	1 st & 3 rd Thursday 9:00 am	Reviews and makes recommendations on land use actions and the City Comprehensive Plan. Many meetings are quasi-judicial in nature.
Public Utility Advisory Board	7 Regular 2 Alternates 1 Rep from Mobile Homes (non-voting member)	2 nd Thursday 9:30 am	Assists in public outreach efforts and makes written and verbal recommendations to the City Commission regarding water and sewer utilities issues.
Zoning Board of Appeals <u>Financial Disclosure Required</u>	7 Regular 2 Alternates	2 nd Friday 9:00 am	Considers appeals on the interpretation and administration of zoning regulations and variances. Handles quasi-judicial issues.

APPENDIX C
FORM #9
Quarterly
Gift Disclosure

Form 9		QUARTERLY GIFT DISCLOSURE (GIFTS OVER \$100)	
LAST NAME -- FIRST NAME -- MIDDLE NAME:		NAME OF AGENCY:	
MAILING ADDRESS:		OFFICE OR POSITION HELD:	
CITY:	ZIP:	COUNTY:	FOR QUARTER ENDING (CHECK ONE): YEAR <input type="checkbox"/> MARCH <input type="checkbox"/> JUNE <input type="checkbox"/> SEPTEMBER <input type="checkbox"/> DECEMBER 20__

PART A — STATEMENT OF GIFTS

Please list below each gift, the value of which you believe to exceed \$100, accepted by you during the calendar quarter for which this statement is being filed. You are required to describe the gift and state the monetary value of the gift, the name and address of the person making the gift, and the date(s) the gift was received. If any of these facts, other than the gift description, are unknown or not applicable, you should so state on the form. As explained more fully in the instructions on the reverse side of the form, you are not required to disclose gifts from relatives or certain other gifts. **You are not required to file this statement for any calendar quarter during which you did not receive a reportable gift.**

DATE RECEIVED	DESCRIPTION OF GIFT	MONETARY VALUE	NAME OF PERSON MAKING THE GIFT	ADDRESS OF PERSON MAKING THE GIFT

CHECK HERE IF CONTINUED ON SEPARATE SHEET

PART B — RECEIPT PROVIDED BY PERSON MAKING THE GIFT

If any receipt for a gift listed above was provided to you by the person making the gift, you are required to attach a copy of that receipt to this form. You may attach an explanation of any differences between the information disclosed on this form and the information on the receipt.

CHECK HERE IF A RECEIPT IS ATTACHED TO THIS FORM

PART C — OATH

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed herein and on any attachments made by me constitutes a true accurate, and total listing of all gifts required to be reported by Section 112.3148, Florida Statutes. _____ SIGNATURE OF REPORTING OFFICIAL	STATE OF FLORIDA COUNTY OF _____ Sworn to (or affirmed) and subscribed before me this _____ day of _____, 20____ by _____ _____ (Signature of Notary Public-State of Florida) _____ (Print, Type, or Stamp Commissioned Name of Notary Public) Personally Known _____ OR Produced Identification Type of Identification Produced _____
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PART D — FILING INSTRUCTIONS

This form, when duly signed and notarized, must be filed with the Commission on Ethics, P.O. Drawer 15709, Tallahassee, Florida 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, Florida 32303. The form must be filed no later than the last day of the calendar quarter that follows the calendar quarter for which this form is filed (For example, if a gift is received in March, it should be disclosed by June 30.)



PART E — INSTRUCTIONS

WHO MUST FILE THIS FORM?

- Any individual, including a candidate upon qualifying, who is required by law to file full and public disclosure of his financial interests on Commission on Ethics Form 6, except Judges. (See Form 6 for a list of persons required to file that form.)
- Any individual, including a candidate upon qualifying, who is required by law to file a statement of financial interests on Commission on Ethics Form 1. (See Form 1 for a list of persons required to file that form.)
- Any procurement employee of the executive branch or judicial branch of state government. This includes any employee of an officer, department, board, commission, council, or agency of the executive branch or judicial branch of state government who has participated in the preceding 12 months through decision, approval, disapproval, recommendation, preparation of any part of a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, or auditing or in any other advisory capacity in the procurement of contractual services or commodities as defined in s. 287.012, F.S., if the cost of such services or commodities exceeds or is expected to exceed \$10,000 in any fiscal year.

NOTE: Gifts that formerly were allowed under Section 112.3148, F.S., now may be prohibited under Sections 11.045, 112.3215, and 112.31485, F.S.

WHAT GIFTS ARE REPORTABLE?

- Any gift (as defined below) you received which you believe to be in excess of \$100 in value, **EXCEPT**:
 - 1) Gifts from the following RELATIVES: father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, half sister, grandparent, great grandparent, grandchild, great grandchild, step grandparent, step great grandparent, step grandchild, step great grandchild, a person who is engaged to be married to you or who otherwise holds himself or herself out as or is generally known as the person whom you intend to marry or with whom you intend to form a household, or any other natural person having the same legal residence as you.
 - 2) Gifts which you are prohibited from accepting by Sections 112.313(4) and 112.3148(4), Florida Statutes. These include any gift which you know or, with the exercise of reasonable care, should know was given to influence a vote or other action in which you are expected to participate in your official capacity; it also includes a gift worth over \$100 from a vendor doing business with your agency, a political committee under the elections law, from a lobbyist who lobbies your agency or who lobbied your agency within the past 12 months, or from a partner, firm, employer, or principal of such a lobbyist.
 - 3) Gifts worth over \$100 for which there is a public purpose, given to you by an entity of the legislative or judicial branch, a department or commission of the executive branch, a water management district created pursuant to s. 373.069, South Florida Regional Transportation Authority, a county, a municipality, an airport authority, or a school board; or a gift worth over \$100 given to you by a direct-support organization specifically authorized by law to support the governmental agency of which you are an officer or employee. These gifts must be disclosed on Form 10.
- A "gift" is defined to mean that which is accepted by you or by another in your behalf, or that which is paid or given to another for or on behalf of you, directly, indirectly, or in trust for your benefit or by any other means, for which equal or greater consideration is not given within 90 days after receipt of the gift. A "gift" includes real property; the use of real property; tangible or intangible personal property; the use of tangible or intangible personal property; a preferential rate or terms on a debt, loan, goods, or services, which rate is below the customary rate and is not either a government rate available to all other similarly situated government employees or officials or a rate which is available to similarly situated members of the public by virtue of occupation, affiliation, age, religion, sex, or national origin; forgiveness of an indebtedness; transportation (unless provided to you by an agency in relation to officially approved governmental business), lodging, or parking; food or beverage; membership dues; entrance fees, admission fees or tickets to events, performances, or facilities; plants,

flowers, or floral arrangements; services provided by persons pursuant to a professional license or certificate; other personal services for which a fee is normally charged by the person providing the services and any other similar service or thing having an attributable value and not already described.

- The following are **NOT** reportable as gifts on this form: salary, benefits, services, fees, commissions, gifts, or expenses associated primarily with your employment, business, or service as an officer or director of a corporation or organization; contributions or expenditures reported pursuant to the election laws, campaign-related personal services provided without compensation by individuals volunteering their time, or any other contribution or expenditure by a political party; an honorarium or an expense related to an honorarium event paid to you or your spouse; an award, plaque, certificate, or similar personalized item given in recognition of your public, civic, charitable, or professional service; an honorary membership in a service or fraternal organization presented merely as a courtesy by such organization; the use of a governmental agency's public facility or public property for a public purpose. Also exempted are some gifts from state, regional, and national organizations that promote the exchange of ideas between, or the professional development of, governmental officials or employees.

HOW DO I DETERMINE THE VALUE OF A GIFT?

- The value of a gift provided to you is determined using the actual cost to the donor, and, with respect to personal services provided by the donor, the reasonable and customary charge regularly charged for such service in the community in which the service is provided. Taxes and gratuities are not included in valuing a gift. If additional expenses are required as a condition precedent to the donor's eligibility to purchase or provide a gift and the expenses are primarily for the benefit of the donor or are of a charitable nature, the expenses are not included in determining the value of the gift.
- Compensation provided by you to the donor within 90 days of receiving the gift shall be deducted from the value of the gift in determining the value of the gift.
- If the actual gift value attributable to individual participants at an event cannot be determined, the total costs should be prorated among all invited persons. A gift given to several persons may be attributed among all of them on a pro rata basis. Food, beverages, entertainment, etc., provided at a function for more than ten people should be valued by dividing the total costs by the number of persons invited, unless the items are purchased on a per-person basis, in which case the per-person cost should be used.
- Transportation should be valued on a round-trip basis unless only one-way transportation is provided. Round-trip transportation expenses should be considered a single gift. Transportation provided in a private conveyance should be given the same value as transportation provided in a comparable commercial conveyance.
- Lodging provided on consecutive days should be considered a single gift. Lodging in a private residence should be valued at \$44 per night.
- Food and beverages consumed at a single sitting or event are a single gift valued for that sitting or meal. Other food and beverages provided on a calendar day are considered a single gift, with the total value of all food and beverages provided on that date being the value of the gift.
- Membership dues paid to the same organization during any 12-month period are considered a single gift.
- Entrance fees, admission fees, or tickets are valued on the face value of the ticket or fee, or on a daily or per event basis, whichever is greater. If an admission ticket is given by a charitable organization, its value does not include the portion of the cost that represents a contribution to that charity.
- Except as otherwise provided, a gift should be valued on a per occurrence basis.

FOR MORE INFORMATION

The gift disclosures made on this form are required by Sec. 112.3148, Florida Statutes. Questions may be addressed to the Commission on Ethics, P.O. Drawer 15709, Tallahassee, Florida 32317-5709 or by calling (850) 488-7864; information is provided at: www.ethics.state.fl.us.

APPENDIX D

Form #30

Donor's Quarterly

Gift Disclosure

(Gifts between

\$25 and \$100)

FORM 30 DONOR'S QUARTERLY GIFT DISCLOSURE (GIFTS BETWEEN \$25 AND \$100)						
NAME OF PERSON SIGNING FORM: (LAST NAME - FIRST NAME - MIDDLE NAME)			FOR QUARTER ENDING (CHECK ONE): <input type="checkbox"/> MARCH <input type="checkbox"/> JUNE <input type="checkbox"/> SEPTEMBER <input type="checkbox"/> DECEMBER			YEAR: 20 _____
NAME OF ORGANIZATION, FIRM, COMMITTEE, OR CORPORATION FILING THIS FORM (if different from name above):			MAILING ADDRESS OF PERSON OR ENTITY FILING THIS FORM STREET OR P.O. BOX: _____ CITY: _____		STATE: _____ ZIP: _____	
INSTRUCTIONS on who must file this form and how to fill it out are on the reverse side. NOTE: In addition to filing this form, the donor must notify the intended recipient <i>at the time the gift is made</i> that the gift will be reported.						
STATEMENT OF GIFTS GIVEN DURING CALENDAR QUARTER VALUED AT MORE THAN \$25 AND NOT MORE THAN \$100						
DATE GIVEN	DESCRIPTION OF GIFT	MONETARY VALUE	NAME OF PERSON WHO MADE THE GIFT	ADDRESS OF PERSON WHO MADE THE GIFT	NAME OF RECIPIENT OF GIFT	ADDRESS OF RECIPIENT
IF CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE <input type="checkbox"/>						
SIGNATURE:			DATE:			
FILING INSTRUCTIONS: WHEN TO FILE: <i>No later than</i> the last day of the calendar quarter following the calendar quarter in which a reportable gift was given (example: if a gift is given in March, the form disclosing it should be filed by June 30). You do not need to file this form unless you have given a reportable gift.			WHERE TO FILE: File with the Commission on Ethics, P.O. Drawer 15709, Tallahassee, Florida 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, Florida 32303. UNLESS the reportable gift was made to an officer or employee of the Legislative Branch of State government (Senate, House of Representatives, Joint Legislative entities, Public Service Commission, Commission on Ethics). Gifts to Legislative Branch officials should be reported on a separate Form 30 filed with Lobbyist Registration, Office of Legislative Services, Room G-68, Claude Pepper Building, 111 W. Madison St, Tallahassee, Florida 32399.			

CE FORM 30 - Effective January 1, 2016 (Rev. 6/2016)
 Incorporated by reference in Rule 34-7.010(1)(j), F.A.C.

(See instructions on reverse side)

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WHO MUST FILE THIS FORM?

- Any person ("lobbyist") who for compensation was seeking at the time a gift was given (or sought during the 12 months preceding the date of the gift) to influence the governmental decisionmaking, proposal, or recommendation of an agency, *IF* that person made, or directed to make, a reportable gift to a reporting individual* or procurement employee** of that agency.
- Any partner, firm, principal, or employer of such a person (lobbyist) *IF* the partner, firm, principal, or employer made, or directed another to make a reportable gift to a reporting individual* or State procurement employee** of the agency that the lobbyist was seeking or sought to influence.
- A "political committee" required to register under the election campaign finance laws that made, or directed another to make, a reportable gift to a reporting individual* or procurement employee**.
- A "vendor" as defined in s. 112.3148(2)(f), F.S., that made, or directed another to make a reportable gift to a reporting individual* or procurement employee**.
- A "reporting individual" is a public officer or employee required to file a CE Form 6 or CE Form 1 financial disclosure statement. Generally, this includes elected officials, candidate for office, most appointed board members, and high level employees at State and local levels of government in Florida.
- A "procurement employee" means any employee of an officer, department, board, commission, council, or agency of the executive branch or judicial branch of state government who has participated in the preceding 12 months through decision, approval, disapproval, recommendation, preparation of any part of a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, or auditing or in any other advisory capacity in the procurement of contractual services or commodities as defined in s. 287.012, F.S., if the cost of such services or commodities exceeds or is expected to exceed \$10,000 in any fiscal year.

This form does not have to be filed unless a reportable gift was made or directed to be made during the last calendar quarter.

WHAT GIFTS ARE REPORTABLE?

Any individual gift (as defined below) valued over \$25 but not over \$100 to a reporting individual or procurement employee on or after October 1, 1991. *The same gift need not be reported by more than one person or entity.*

Note: Gifts that formerly were allowed under Section 112.3148, F.S. now may be prohibited expenditures under Sections 11.045, 112.3215, and 112.31485, F.S.

CE FORM 30 - Effective January 1, 2016 (Rev. 6/2016)
Incorporated by reference in Rule 34-7.010(1)(i), F.A.C.

WHAT IS A "GIFT"?

- A "gift" is defined to mean that which is accepted by an official or by another in his or her behalf, or that which is paid or given to another for or on behalf of the official, directly, indirectly, or in trust for the official's benefit or by any other means, for which equal or greater consideration is not given within 90 days following receipt of the gift.
- A "gift" includes: real property and its use; tangible or intangible personal property and its use; transportation (unless provided by an agency in relation to officially approved governmental business), lodging or parking; food or beverage; membership dues; entrance fees, admission fees, or tickets to events, performances, or facilities; plants, flowers, or floral arrangements; services provided by persons pursuant to a professional license or certificate; other personal services for which a fee is normally charged; forgiveness of an indebtedness; a preferential rate or terms on a debt, loan, goods, or services that is not available to all similarly situated officials or to members of the public by virtue of occupation, affiliation, age, religion, sex, or national origin; and any other similar service or thing having an attributable value.
 - The following are **NOT REPORTABLE** as gifts on this form: a gift accepted on behalf of a government entity or charitable organization; a gift having a public purpose from a legislative or judicial branch entity, from an executive branch department or commission, from a water management district, the South Florida Regional Transportation Authority, or from a county, municipality, airport authority, or school board; a gift from a direct-support organization authorized by law to support a government entity to an officer or employee of that entity; salary, benefits, services, fees, commissions, gifts, or expenses primarily associated with the recipient's business, employment, or service as an officer or director of a corporation or organization; contributions or expenditures reported pursuant to the election laws, campaign-related personal services provided by individual volunteers, and any contribution or expenditure by a political party; an honorarium or an expense related to an honorarium event to the official or official's spouse; an award, plaque, certificate, or similar personalized item given in recognition of the official's public, civic, charitable, or professional services; an honorary membership in a service or fraternal organization presented merely as a courtesy; and the use of public property or facilities for a public purpose. Also exempted are some gifts from state, regional, and national organizations that promote the exchange of ideas between or the professional development of governmental officials or employees.

HOW I VALUE A GIFT?

- Except as provided below, the value of a gift is the actual cost to the donor valued on a per occurrence basis. Compensation provided within 90 days of the gift by the recipient to the donor should be deducted from the value of the gift. Taxes and gratuities are not included in valuing a gift.
- Entrance fees, admission fees, or tickets: face value of the ticket/fee or on a daily per event basis, whichever is greater. If an admission ticket is given by a charitable organization, its value does not include the portion of the cost that represents a contribution to that charity.
 - Lodging: on consecutive days is considered a single gift; lodging in a private residence is valued at \$44 per night.
 - Transportation: value as a single gift on a round-trip basis (unless only one-way transportation is provided); value transportation in a private conveyance as if it were in a comparable commercial conveyance.
 - Food and beverages consumed at a single sitting or event are a single gift valued for that sitting or meal; other food and beverages provided on a calendar day are considered a single gift, with the total value of all food and beverages provided on that date being the value of the gift.
 - Personal services: value at the reasonable and customary charge for such services in the community where provided.
 - Membership dues: value as a single gift all dues paid to the same organization during any 12-month period.
 - Prorate total costs of an event among all invited persons if gift value for an individual participant cannot be determined. A gift given to several persons may be attributed among all of them on a pro rata basis. Food, beverages, entertainment, etc. provided at a function for more than ten people should be valued by dividing the total costs by the number of persons invited, unless the items are purchased on a per-person basis, in which case the per-person cost should be used.
 - Do not include additional expenses required as a condition precedent to the donor's eligibility to purchase or provide the gift if such expenses are primarily for the benefit of the donor or are of a charitable nature.

FOR MORE INFORMATION:

This statement is required by Section 112.3148, Florida Statutes. Questions about the form or this law may be addressed to the Commission on Ethics, Post Office Drawer 15709, Tallahassee, Florida 32317-5709; telephone (850) 488-7864; information is also provided at: www.ethics.state.fl.us.

APPENDIX E

FILING INFORMATION

FOR FINANCIAL FORMS

FILING INFORMATION

Statement of Financial Interests (Form 1)

WHO FILES	WHEN FILED	WHERE FILED
Local Officers as defined in Section 112.3145(1)(a), Florida Statutes .	Within 30 days of appointment or employment and then annually by July 1 of each year.	Supervisor of Elections in county where local officer permanently resides.
Specified State Employees as defined in Section 112.3145(1)(b), Florida Statutes .	Within 30 days of appointment or employment and then annually by July 1 of each year.	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303
State Officer (other than those required to file CE Form 6) as defined in Section 112.3145(1)(c), Florida Statutes .	Within 30 days of appointment or employment and then annually by July 1 of each year.	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303
Candidates for local elective office (other than those required to file CE Form 6).	At the same time qualifying papers are filed.	With officer before whom they qualify.

Final Statement of Financial Interests (Form 1F)

WHO FILES	WHEN FILED	WHERE FILED
Local Officers as defined in Section 112.3145(1)(a), Florida Statutes , and candidates for such office.	Within 60 days after leaving employment, unless taking another position that requires financial disclosure (Form 1 or Form 6).	Supervisor of Elections in county where local officer permanently resides.
Specified State Employees as defined in Section 112.3145(1)(b), Florida Statutes .	Within 60 days after leaving employment, unless taking another	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317

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	position that requires financial disclosure (Form 1 or Form 6).	OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303
State Officer (other than those required to file CE Form 6) as defined in Section 112.3145(1)(c), Florida Statutes .	Within 60 days after leaving employment, unless taking another position that requires financial disclosure (Form 1 or Form 6).	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303

Amendment to Statement of Financial Interests (Form 1X)

WHO FILES	WHEN FILED	WHERE FILED
Local Officers as defined in Section 112.3145(1)(a), Florida Statutes .	When seeking to amend a previously-filed Form 1, Statement of Financial Interests.	Supervisor of Elections in county where local officer permanently resides.
Specified State Employees as defined in Section 112.3145(1)(b), Florida Statutes .	When seeking to amend a previously-filed Form 1, Statement of Financial Interests.	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303
State Officer (other than those required to file CE Form 6) as defined in Section 112.3145(1)(c), Florida Statutes .	When seeking to amend a previously-filed Form 1, Statement of Financial Interests.	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303

Full and Public Disclosure of Financial Interests (Form 6)

WHO FILES	WHEN FILED	WHERE FILED
All elected constitutional officers and candidates for such office, plus:	Incumbent officials must file annually by July 1.	Florida Commission on Ethics P. O. Drawer 15709

http://www.ethics.state.fl.us/Documents/Forms/Form1.html#form_1

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<p>Jacksonville mayor and City Council members, Duval County School Superintendent, Appellate Court Judges and Judges of Compensation Claims; Florida Housing Finance Corporation; Florida Prepaid College Board; and certain expressway authorities, transportation authorities and toll authorities.</p>	<p>Candidates must file at the time of qualifying.</p>	<p>Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303 Candidates file with the officer before whom they qualify.</p>
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Final Full and Public Disclosure of Financial Interests (Form 6F)

WHO FILES	WHEN FILED	WHERE FILED
<p>All elected constitutional officers, plus: Jacksonville mayor and City Council members, Duval County School Superintendent, Appellate Court Judges and Judges of Compensation Claims; Florida Housing Finance Corporation; Florida Prepaid College Board; and certain expressway authorities, transportation authorities and toll authorities.</p>	<p>Within 60 days after leaving public office or employment, unless taking another position that requires full and public financial disclosure using Form 6.</p>	<p>Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>

Amendment to Full and Public Disclosure of Financial Interests (Form 6X)

WHO FILES	WHEN FILED	WHERE FILED
<p>All elected constitutional officers and candidates for such office, plus: Jacksonville mayor and City Council members, Duval County School Superintendent, Appellate Court Judges and Judges of Compensation Claims; Florida Housing Finance Corporation; Florida Prepaid College Board; and certain expressway authorities, transportation authorities and toll authorities.</p>	<p>When seeking to amend a previously-filed Form 6, Full and Public Disclosure of Financial Interests.</p>	<p>Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>

Memorandum of Voting Conflict for State Officers (Form 8A)

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http://www.ethics.state.fl.us/Documents/Forms/Form1.html#form_1

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WHO FILES	WHEN FILED	WHERE FILED
State-level Public Officers faced with a voting conflict of interest under Section 112.3143(2), Florida Statutes .	Within 15 days after vote occurs.	With person responsible for recording minutes of meeting
Additional requirements for appointed public officers (see Section 112.3143(4), Florida Statutes).	Within 15 days after "participating" in matter.	With person responsible for recording minutes of meeting

Memorandum of Voting Conflict for County, Municipal and other Local Public Officers (Form 8B)

WHO FILES	WHEN FILED	WHERE FILED
County, municipal, or other local public officers.	Within 15 days after vote occurs.	With person responsible for recording minutes of meeting
Additional requirements for appointed public officers (see Section 112.3143(4), Florida Statutes).	Within 15 days after "participating" in matter.	With person responsible for recording minutes of meeting

Quarterly Gift Disclosure (Form 9)

WHO FILES	WHEN FILED	WHERE FILED
<p>"Reporting Individual" means any individual who is required to file CE Form 6 (except Judges); any individual who is required to file CE Form 1.</p> <p>"Procurement employee" means state-level employee who participates in the procurement of contractual services or commodities if the cost exceeds or is expected to exceed \$10,000 in any fiscal year.</p>	<p>On the last day of the calendar quarter (March 31, June 30, Sept. 30, Dec. 31) for gifts received during the previous calendar quarter and valued in excess of \$100.</p> <p>No reporting required if no gifts were received.</p>	<p>Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>

Annual Disclosure of Gifts from Governmental Entities and Direct-Support Organizations and Honorarium Event Related Expenses (Form 10)
http://www.ethics.state.fl.us/Documents/Forms/Form1.html#form_1

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WHO FILES	WHEN FILED	WHERE FILED
<p>"Reporting Individual" means any individual who is required to file CE Form 6 (except Judges); any individual who is required to file CE Form 1.</p> <p>"Procurement employee" means state-level employee who participates in the procurement of contractual services or commodities if the cost exceeds or is expected to exceed \$10,000 in any fiscal year.</p>	<p>July 1 if a reportable gift or honorarium event-related expenses received during the preceding calendar year.</p>	<p>Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>

Donor's Quarterly Gift Disclosure (Gifts Between \$25 and \$100) (Form 30)

WHO FILES	WHEN FILED	WHERE FILED
<p>A vendor doing business with a reporting individual or procurement employee's agency, or lobbyist or the partner, firm, principal, or employer of a lobbyist who makes or directs another to make a gift with a value in excess of \$25, but not in excess of \$100.</p>	<p>On the last day of each calendar quarter (March 31, June 30, Sept. 30, Dec. 31) for the previous calendar quarter in which a reportable gift is made.</p>	<p>For <u>gifts given to reporting individuals in the Legislative Branch</u>, file with: Division of Legislative Information Services, Room G-68, Claude Pepper Bldg., 111 W. Madison St., Tallahassee, FL 32399-1425.</p> <p>For <u>gifts given to non-legislative reporting individuals and procurement employees</u>, file with:</p> <p>Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>

Quarterly Client Disclosure (Form 2)

WHO FILES	WHEN FILED	WHERE FILED
<p>Any elected constitutional officer, state officer, local officer, or specified state</p>	<p>On the last day of each calendar quarter (March</p>	<p>A Local Officer should file with the Supervisor of Elections of the county where he or she resides or</p>

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<p>employee [i.e., persons required to file either Form 6 or Form 1] who (or whose professional firm) has represented a client for a fee or commission before an agency at his or her level of government, with certain exceptions.</p>	<p>31, June 30, Sept. 30, Dec. 31) for the previous calendar quarter in which a reportable representation occurred.</p>	<p>is principally employed. All others (elected constitutional officers, state officers, and specified state employees) should file with: Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303</p>
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Interest in Competitive Bid for Public Business (Form 3A)

WHO FILES	WHEN FILED	WHERE FILED
<p>A public officer or public employee who (or whose firm or employer) seeks to do business with his or her agency through a system of sealed, competitive bidding, and who seeks to exempt the transaction from the prohibitions of the Code of Ethics as provided in Section 112.313(12)(b), Florida Statutes.</p>	<p>Prior to or at the time of the submission of the bid.</p>	<p>A state officer or employee should file this form with the Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303 An officer or employee of a political subdivision of this state should file this form with the Supervisor of Elections of the county in which the agency in which the individual is serving has its principal office.</p>

Disclosure of Business Transaction, Relationship, or Interest (Form 4A)

WHO FILES	WHEN FILED	WHERE FILED
<p>This form is used to comply with two different exemptions from the prohibitions of the Code of Ethics. A member of an advisory board may have his or her conflict of interest waived by the appointing authority after disclosure of the transaction or relationship using this form, as provided in Section 112.313(12), Florida Statutes. Also, certain conflicts of interest arising from transactions involving a sole source of supply may be waived provided that</p>	<p>For advisory board members, prior to the waiver. For persons seeking a sole source waiver, prior to the purchase, rental, sale,</p>	<p>For advisory board members, with the person or body that appointed the individual to the board. For sole source transactions, with the governing body of the political subdivision of the</p>

http://www.ethics.state.fl.us/Documents/Forms/Form1.html#form_1

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Florida Commission on Ethics - Filing Information

disclosure of the conflict is made, using this form, as provided in Section 112.313(12)(e), Florida Statutes .	leasing, or other business being transacted.	officer or employee seeking the exemption.
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Certification By Trustee of Qualified Blind Trust (Form 40)

WHO FILES	WHEN FILED	WHERE FILED
The trustee appointed by a public officer who created a qualified blind trust pursuant to Section 112.31425, Florida Statutes .	Within 5 business days after qualified blind trust agreement is executed.	Florida Commission on Ethics P. O. Drawer 15709 Tallahassee, Florida 32317 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303

Public Records Exemption Request

WHO FILES	WHEN FILED	WHERE FILED
<p>"Reporting Individual" means any individual who is required to file CE Form 6; any individual who is required to file CE Form 1.</p> <p>"Procurement employee" means state-level employee who participates in the procurement of contractual services or commodities if the cost exceeds or is expected to exceed \$10,000 in any fiscal year.</p>	<p>Florida law provides that an agency shall treat social security numbers, bank account numbers, and debit, charge, and credit card numbers as automatically exempt from public disclosure. In addition, Florida law allows eligible persons to request in writing that a non-employing agency maintain as exempt from public disclosure certain identification and/or location information contained in records within the agency's custody. The person entitled to the additional exemptions must submit a written request directly to this agency to maintain the exemption to the records in our custody. § 119.071(4)(d)3., F.S. You are not required to use this form; however doing so will help us in keeping your information confidential.</p>	<p>Please return this completed form or a written request to:</p> <p>Florida Commission on Ethics P.O. Drawer 15709 Tallahassee, Florida 32317-5709 OR 325 John Knox Road, Bldg E, Ste 200 Tallahassee, Florida 32303.</p>



APPENDIX F

CITY MAP

