



Memorandum

TO:HONORABLE MAYOR
AND CITY COUNCIL

FROM: Toni J. Taber, MMC
Jennifer A. Maguire

SUBJECT:See Below

DATE: May 6, 2025

COUNCIL DISTRICT: Citywide

**SUBJECT: New City Council Policy for Seamless Transition of City
Elected Official Offices**

RECOMMENDATION

Adopt a resolution approving a new City Council Policy 0-47 "Transition of Elected Officials" for an effective transition between incoming and outgoing Mayor and Councilmembers, including the standard use and ownership of digital marketing and communications assets, constituent data, software access and administration, use of City-based accounts, asset inventories, physical equipment, and other transition activities.

SUMMARY AND OUTCOME

The City Council recognized the need for a policy¹ to govern the transition of digital solutions, constituent data, and physical equipment to newly elected Mayor and City Council Offices, ensuring a consistent transition during changes in elected officials while maintaining services to community members throughout these transitions.

The proposed City Council Policy 0-47 "Transition of Elected Officials" will provide guidelines and requirements for an effective transition, including the ownership and registration of digital marketing and communications assets, constituent data, software access and administration, use of City-based accounts, asset inventories, physical equipment, and transition activities. See **Attachment A** for the proposed new City Council Policy 0-47.

¹ The need for a policy to govern transitions of elected officials was recommended in the memorandum to the Joint Meeting for the Rules and Open Government Committee and Committee of the Whole on September 21, 2023, titled "Creation of a City Council Policy for Uniform Transitions During Changes in Elected Officials" and was approved by the Committee to be brought forward for City Council Consideration. Source: <https://sanjose.legistar.com/View.ashx?M=F&ID=12319136&GUID=F496AAF1-16A4-47C1-AE59-19185DB0F06C>

BACKGROUND

A standardized process for centralizing administrative access and transitioning digital assets, such as software accounts, is needed to ensure a smooth transition between outgoing and incoming elected officials, including the Mayor and City Councilmembers.

In some previous transitions of City Council Offices, service interruptions occurred that led to the inability of incoming Councilmembers' staff to access existing social media accounts, web platforms, and constituent data, such as mailing lists. Security and privacy policies of technology companies make it a long and difficult process to reestablish access, leading to inconvenience and confusion for constituents and other types of City customers in affected parts of the City. In contrast, some City Council Offices have executed thorough and detailed transition plans for newly elected officials and their staff. These plans have included software licensing, web platforms, databases, equipment, communications to constituents, and vendor handoffs.

On September 27, 2023, the Rules and Open Government Committee approved the recommendation for the City Manager and City Attorney, in collaboration with the City Clerk and the Information Technology Department (ITD), to evaluate the feasibility of a City Council Policy that would standardize transitions for the Mayor and City Councilmembers.

ANALYSIS

City staff evaluated the feasibility of a City Council Policy to standardize transitions for the Mayor and City Councilmembers. The evaluation:

- Analyzed the current technology used by the Mayor and City Councilmembers;
- Conducted market research on technology tools and functionality to fit resident service delivery needs;
- Researched laws and regulations to ensure compliance with the Americans with Disabilities Act accessibility, State of California Government Code Section 50034, cybersecurity, records retention, etc.;
- Communicated with government affairs staff from technology companies to clarify administration processes;
- Collaborated internally with various departments to align on strategy; and
- Assessed staff capacity to implement any new policy.

The proposed City Council Policy 0-47 establishes minimum guidelines to ensure an effective transition with no additional staff needed. The proposed City Council Policy includes guidelines requiring City-based accounts for all software and services for City business and constituent data management, equipment inventory requirements, website domain requirements, and processes for onboarding and offboarding City Council staff.

Below are responses to the eight recommendations outlined in the memorandum to the Rules and Open Government Committee on September 21, 2023, titled "Creation of a City Council Policy for Uniform Transitions During Changes in Elected Officials." These responses are included in the proposed City Council Policy 0-47.

Recommendation #1: Mayor and City Council Offices to use City-based accounts for ownership and access credentials for social media, website domain registrations, constituent databases, and software subscriptions, as well as require administrative accounts for the Information Technology Department and/or the City Clerk to administer costs, contracts, and transitions when there is a change in elected officials. Data is not to be shared with any other department or office and must be safeguarded.

Administration's Response

The analysis of the current inventory of software, web platforms and domains, and social media accounts revealed that multiple technologies are being used among City Council Offices to achieve the same outcomes in terms of marketing email, Constituent Relationship Management (CRM), web hosting, and social media to be used for official City business communications. Technologies used among City Council Offices lack consistency.

City Official Accounts:

To ensure City communications reach the wide and diverse community of San José, the City uses multiple tools. The Administration will provide elected officials with core accounts and software, including social media, CRM, e-mail communications, and access to the City website to update or create City Council Office webpages.

Campaign Accounts:

The Mayor and City Councilmembers will not convert their campaign accounts into an official government account.

Personal Accounts:

Social media accounts registered to an elected individual under their name (e.g., “Jane Smith, San Jose Councilmember”) would be owned by that individual and will be governed by the First Amendment if used in official business (e.g., cannot delete comments or block users based on their viewpoint).

Website Domain Registrations:

In accordance with State of California Government Code Section 50034, all local agencies that maintain an internet website for use by the public are required to have a “.gov” domain by January 1, 2029. City Policy 1.7.9 Website and Digital Services Governance enacts the policy and procedures for website domains, including responsibilities and technical definitions. ITD acquires, maintains, and administers website domains per City Policy.

Constituent Databases / CRM:

ITD will provide Mayor and City Council Offices with core accounts for constituent databases / CRM and email newsletter solutions. The City will provide support to transition existing non-standard accounts to the City’s CRM by December 15, 2025. Constituent profile data will be centralized to ensure consistency and will be accessible to City departments and other elected offices to better serve residents while supporting compliance with the Brown Act.

Equipment:

ITD ensures asset management for all ITD items and Public Works Department (DPW) for standard items (e.g., digital cameras, furniture). The City Clerk ensures the inventory list from the Mayor and City Councilmembers is regularly updated.

Recommendation #2: *Consistent with Assembly Bill 1637, provide a general plan for the City to adopt “.gov”, coordinate City ownership of registrations by the City’s Information Technology Department and/or the City Clerk and applying security and privacy standards set per City Council policy.*

Administration’s Response

California Governor Gavin Newsom signed Assembly Bill 1637² into law on October 8, 2023. The bill requires local agencies that maintain an internet website for use by the public to have a “.gov” domain by January 1, 2029. For example, a City website currently using “example.org” domain is required to change to example.sanjoseca.gov.

² https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202320240AB1637

City Administrative Policy 1.7.9, the Website and Digital Service Governance policy, outlines the management and governance of the City of San José website, sanjoseca.gov, including all sub-sites and transactional applications. It includes Citywide standards and rules, a framework for creating clear content, digital service management responsibilities, and inclusive access, among other guidelines. To comply with State of California Government Code Section 50034, City Administrative Policy 1.7.9 will be updated in Fiscal Year 2025-2026 to include a clear set of criteria and procedures to request subdomains of the City's domain, sanjoseca.gov.

After the policy is updated, the City Manager's Office of Communications and ITD will start the preliminary review and plan for transition before January 1, 2029.

Recommendation #3: City-based social media accounts are to be set as business accounts for the use of the office and should be used as the primary account for constituent communications.

Administration's Response

Staff conducted research on the feasibility of business accounts for over ten social media software and concluded that most did not have an additional cost.

ITD will administer business accounts for social media platforms. Access granted will align with approvals provided by the Elected Official or their Chief of Staff. Access requests or removals will be submitted through the Help Desk system. ITD will not post any content on behalf of the Elected Official or their City Council Office.

Recommendation #4: Optimize a smooth transition experience for outgoing and incoming elected officials to ensure the residents of San José are always served.

Administration's Response

The City Clerk's Office coordinates with the City Manager's Office and City departments (ITD, DPW, Human Resources) to prepare for incoming and outgoing Mayor and City Councilmembers transitions.

The City Clerk's Office begins the transition process with a briefing to newly elected Mayor and Councilmembers after final election results, prior to assuming office.

Onboarding items may include, but are not limited to, the following:

1. Staffing and hiring;
2. Mayor or City Council Office budget review;
3. Mayor or City Council Office non-personal/equipment procurement; and
4. Council Policy 0-38 City Council Expenditure and Reimbursement Policy.

Consistent with past practice, the City Manager's Office provides and coordinates an orientation to Mayor and Councilmembers on City departments and functions and a general overview of how the organization is organized to deliver effective, efficient, and well-coordinated services. The City Attorney's Office assists the City Clerk's Office, City Manager's Office, and others in providing necessary trainings to the Mayor and City Councilmembers on topics including, but not limited to, the Brown Act, Public Records Act, or other legal matters.

Offboarding items for outgoing Mayor and City Councilmembers that the City Clerk's Office coordinates may include, but are not limited to, the following:

1. Final reconciliation of budgets, including grants;
2. Collecting returned inventory, as detailed in Recommendation #5;
3. Deactivate procurement cards; and
4. Staffing and Notice of Separation.

Recommendation #5: Ensure the Clerk's Office maintains a checklist of all City owned and purchased assets, both digital and physical.

Administration's Response

The City Clerk's Office maintains an internal document for transition processes for incoming and outgoing Mayor and City Councilmembers, which details responsible parties, items procured, and assignment of ownership.

Under the proposed City Council Policy 0-47, each Mayor and City Councilmember will be responsible for maintaining an inventory checklist of all City-owned and purchased assets, including web-based software and subscriptions.³ A template for this checklist will be provided by the City Clerk's Office and coordinated with ITD and DPW. The Mayor and City Council Offices

³ This inventory list shall include, but not be limited to, laptops, tablets, phones; large purchases used for constituent events, such as canopies, tables, and lecterns; office supply purchases, such as sit-stand desks and ergonomic chairs; and software. Consumables or small accessories, such as pens, swag, notepads, or charging cables would be excluded. Web-based software may include social media, web hosting, photo and video sharing, wikis, blogs, etc. Please refer to City Policy 1.7.7 for additional information.

will provide shared access to the City Clerk's Office with quarterly updates (including any new assets procured) throughout their term. See **Attachment B** for an example.

Each outgoing Mayor and City Councilmember will provide the City Clerk's Office the inventory list containing a final list of all assets before leaving, that will, in turn, be provided to the incoming Mayor and City Councilmembers. All branded items (e.g., promotional items and marketing material) that cannot be used by the next elected Mayor and City Councilmember, but were paid for with City funds, must remain with the City, will be transferred to DPW for surplus.

Recommendation #6: Anything else related to the transition of elected officials that staff identifies as applicable.

Administration's Response

The proposed City Council Policy 0-47 establishes minimum guidelines for an effective transition of the administrative functions of the Mayor and City Councilmembers.

Recommendation #7: Address and evaluate any potential legal issues.

Administration's Response

This memorandum and the proposed City Council Policy 0-47 have been reviewed by the City Attorney's Office.

Recommendation #8: Exemptions should apply for the continued use of previously created and in-use social media accounts, as well as for domains/websites of the current Mayor and Councilmembers until a change in elected official occurs, however login credentials and account ownership should be provided to the appropriate city department.

Administration's Response

The proposed City Council Policy 0-47 provides the structure to prevent lapses in constituent communication and services between transitions. Exemptions to this policy will risk an inefficient transition of such services and communication, therefore, both the City Clerk's Office and the City Manager's Office strongly recommend all current Mayor and City Councilmembers officially transition to City Council Policy 0-47.

Refer to Recommendation #1 for social media accounts. If current Mayor and City Councilmembers have software and service accounts not connected to City-based accounts, they must update these accounts from personal accounts to City-based accounts by the end of 2025 as part of this new recommended policy.

EVALUATION AND FOLLOW-UP

Implementation of City Council Policy 0-47 will be evaluated by the City Clerk's Office with a constituent and councilmember lens during each transition and areas for improvement may be incorporated into future policies or operating procedures.

COORDINATION

This memorandum has been coordinated with the City Attorney's Office, City Manager's Budget Office, City Manager's Office of Communications, ITD, and DPW.

PUBLIC OUTREACH

This memorandum will be posted on the City's Council Agenda website for the May 20, 2025 City Council meeting.

COMMISSION RECOMMENDATION AND INPUT

No commission recommendation or input is associated with this action.

CEQA

Not a Project, File No. PP17-008, General Procedure and Policy Making resulting in no changes to the physical environment.

HONORABLE MAYOR AND CITY COUNCIL

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PUBLIC SUBSIDY REPORTING

This item does not include a public subsidy as defined in section 53083 or 53083.1 of the California Government Code or the City's Open Government Resolution.



TONI J. TABER, MMC
City Clerk



JENNIFER A. MAGUIRE
City Manager

For questions, please contact Toni J. Taber, City Clerk, at Toni.Taber@sanjoseca.gov.
or Khaled Tawfik, Chief Information Officer, ITD, at Khaled.Tawfik@sanjoseca.gov.

ATTACHMENTS

A – City Council Policy 0-47 Transition of Elected Officials

B – Mayor and City Council Sample Technology Inventory List

Attachment A

City of San José, California **COUNCIL POLICY**

TITLE TRANSITION OF ELECTED OFFICIALS	PAGE 1 of 4	POLICY NUMBER 0-47
EFFECTIVE DATE	REVISED DATE	
APPROVED BY COUNCIL ACTION		

DRAFT--Contact the City Clerk's Office at (408) 535-1260 or CityClerk@sanjoseca.gov for final document.

PURPOSE AND SCOPE

The City of San José (City) residents, businesses, and visitors are best served by a standardized and seamless process for transitioning newly elected Mayor and City Councilmembers into their new roles.

The purpose of this policy is to establish formal rules and guidelines for an effective transition regarding the standard use and ownership of digital marketing and communications assets, constituent data, software access and administration, use of City-based accounts, asset inventories, physical equipment, staffing and budget administration, and other transition activities.

POLICY

Following these procedures will support a seamless transition between incoming and outgoing Mayor and City Councilmembers with the intent to facilitate service continuity and ensure the community is well served through and after transitions.

1. RESPONSIBILITY

A. Mayor and City Councilmembers

The Mayor and Councilmembers shall be responsible for being in compliance with the policy and maintaining a regularly updated inventory list of technology and physical equipment in coordination with the appropriate departments (City Clerk, Information Technology (ITD), Public Works (DPW) as well as use of the City's Constituent Relationship Management (CRM) system.

B. The City Clerk's Office

The City Clerk's Office shall lead and coordinate the transition for newly elected and outgoing Mayor and City Councilmembers.

C. The City Manager's Office

The City Manager's Office shall support the transition for newly elected Mayor and City Councilmembers and provide an overview of City departments and functions.

D. The City Attorney's Office

The City Attorney's Office shall support the City Clerk, City Manager, and others in the transition of newly elected Mayor and City Councilmembers and assist in providing necessary trainings, such as on the Brown Act, Public Records Act or other legal matters.

E. Information Technology Department

ITD shall support the transition for newly elected Mayor and City Councilmembers by ensuring ITD asset management for all information technology items. ITD shall be the designated super user administrator for social media accounts and administer software technology contracts. ITD shall provide and support the City Council CRM system.

F. Public Works Department

DPW shall support the transition for newly elected Mayor and City Councilmembers and ensure DPW asset management for standard physical items.

2. TRANSITION

The City Clerk's Office shall coordinate with the City Manager's Office and City departments (ITD, DPW, Human Resources) to prepare for incoming and outgoing Mayor and City Councilmembers transitions.

A. On-boarding

The City Clerk's Office shall begin the transition process with a briefing to newly elected Mayor and Councilmembers after final election results, prior to assuming office. On-boarding items may include, but are not limited to, the following:

1. Staffing and hiring.
2. Mayor or Council Office budget review.
3. Mayor or Council Office non-personal/equipment procurement.
4. Council Policy 0-38 City Council Expenditure and Reimbursement Policy.

The City Manager's Office shall provide and coordinate an orientation to Mayor and City Councilmembers on City departments and functions. The City Attorney's Office shall assist the City Clerk's Office, the City Manager's Office, and others in providing necessary trainings to Mayor and Councilmembers on topics including, but not limited to, the Brown Act, Public Records Act, or other legal matters.

Training outside the transition period may be provided upon request as new Mayor and Councilmember staff joins the City.

B. Off-boarding

Off-boarding items for outgoing Mayor and City Councilmembers shall be coordinated by the City Clerk's Office and may include, but are not limited to the following:

1. Final reconciliation of budgets, including grants;
2. Collecting returned inventory;
3. Deactivate procurement cards; and
4. Administering staffing and notices of separation.

3. ADMINISTRATION OF TECHNOLOGY

The Administration shall provide newly elected Mayor and Councilmembers with core accounts and software for social media, e-mail communications, the CRM system, and web platforms to be used for official City business communications.

To ensure continued services to the community with no lapse, all outgoing Mayor and City Councilmembers shall transition communication accounts and software to the City Clerk's Office five business days before leaving office.

Use of City-based accounts for all software and services used for City business: All software and service accounts used for City business (e.g., social media, e-mail marketing, constituent database, software subscriptions) must be connected to users with an active City-based account. The Mayor and City Councilmembers shall not convert their campaign social media accounts into an official government account. All official City business communication must originate from a City-based account.

City-based social media accounts are to be set as business accounts for the use of the individual office and should be used as the primary account for communications with the community. ITD shall administrate business accounts for social media platforms. Access granted align with approvals provided by the Elected Official or their Chief of Staff. Access requests or removals shall be submitted through the ITD Help Desk system. ITD will not post any content on behalf of the Elected Official or their Council Office.

Personal Social Media Accounts: Social media accounts registered to an elected individual under their name (e.g. "Jane Smith, San Jose Councilmember") will be owned by that individual. However, if used for official business, that personal account shall be governed by the First Amendment (e.g., cannot delete comments or block users based on their viewpoint).

Website Domain Registrations: In accordance with California Assembly Bill 1637, all local agencies that maintain an internet website for use by the public are required to have a ".gov" or ".ca.gov" domain. City Administrative Policy 1.7.9 Website and Digital Services Governance enacts the policy and

procedures for website domains, including responsibilities and technical definitions. ITD acquires, maintains, and administers website domains per City Policy 1.7.9.

Equipment: ITD shall manage the lifecycle of ITD equipment. DPW shall manage assets including, but not limited to, furniture, City badges, and fleet vehicles. The City Clerk's Office shall manage the budget and procurement of ITD equipment for the Mayor and City Councilmembers.

Each Mayor and City Councilmember shall be responsible for maintaining an inventory list of all City-owned and purchased assets, including web-based software and subscriptions. A template for this checklist shall be provided to the Mayor and City Council Offices by the City Clerk's Office and coordinated with ITD and DPW. Mayor and City Councilmembers shall be responsible for maintaining an updated inventory list of technology and physical equipment. Mayor and City Council Offices shall provide shared access to the City Clerk's Office with quarterly updates (including any new assets procured) throughout their term.

Each outgoing Mayor and City Councilmember shall provide the City Clerk's Office the inventory list containing a final list of all assets before leaving, that shall, in turn, be provided to the incoming Mayor and City Councilmembers. All branded items (e.g., promotional items and marketing material) that cannot be used by the next elected Mayor and Councilmembers, but were paid for with City funds, must remain with the City, shall be transferred to DPW for surplus.

4. FIRST AMENDMENT

It should be noted that the First Amendment always governs the official City accounts.

Attachment B

Mayor and City Council Sample Technology Inventory List

Device	Asset Tag	Phone number, if applicable	Assigned to / Status (Employee Using / Lost / Stolen)	Notes (e.g. date obtained)
Laptop	CSJ12345	N/A	Chief of Staff Alfred Pennyworth- Lost	Reported lost 01/01/2024
Laptop	CSJ12346	N/A	Chief of Staff Alfred Pennyworth	Replaced CSJ12345
Cell Phone	CSJ11111	408-535-0000	Councilmember Bruce Wayne	
Tablet	CSJ22222	408-535-1111	Councilmember Bruce Wayne	
Ergo Chair	N/A	N/A	Barbara Gordon	Per ergo eval 10/11/2023
Canopy	N/A	N/A	Stored at Gotham City Community Center storeroom	Customized with Bruce Wayne's logo;
Tables	N/A	N/A	Stored in Gotham City Community Center storeroom	Five tables for events; obtained 04/01/2023.
Web Hosting	N/A	N/A	Chief of Staff Alfred Pennyworth	For waynenterprises.org Squarespace hosting that went live on 10/10/2023

Note: All data shown in table are fictitious sample data only.