

# City of Palo Alto Advocacy Process Manual 2020 update

## TABLE OF CONTENTS

### PAGE 2

PURPOSE

LEGISLATIVE GUIDELINES

COORDINATION OF THE LEGISLATIVE PROGRAM

### PAGE 3

THE ROLE OF THE CITY COUNCIL

THE ROLE OF THE CMO

### PAGE 4

THE ROLE OF CITY DEPARTMENTS

CITY ADVISORY COMMISSIONS AND COMMITTEES

UTILITIES DEPARTMENT

### PAGE 5

LEGISLATIVE ADVOCACY IN SPECIAL CIRCUMSTANCES

SIGNATURES ON LEGISLATIVE COMMUNICATION

LOBBYING BY CITY PERSONNEL

### PAGE 6

ADVOCACY METHODS

CITY COUNCIL MEETINGS WITH OTHER ELECTED OFFICIALS

STATE LEGISLATIVE TIMELINE

CITY-SPONSORED STATE LEGISLATION

**Advocacy Process Manual**  
**2020 update**

**PURPOSE**

---

The goals of the City of Palo Alto's Legislative Program (Program) are to:

1. Describe the internal procedures related to state and federal advocacy, and
2. Ensure potentially impactful state and federal legislation is identified, analyzed, tracked, and possibly, communicated to policymakers

**LEGISLATIVE GUIDELINES**

---

Each year<sup>1</sup> staff will suggest specific legislative priorities for Council approval, first at a Policy and Services Committee meeting, and then once approved, before the full Council. Ideally, the priorities will be fully approved by Council in December or January in advance of the upcoming state legislative session. As the priorities will have been discussed and approved by the Policy and Services Committee, they will be placed on the Council's consent agenda, unless requested otherwise.

The Legislative Guidelines provide direction to the City Council, City staff, and the City's state and federal legislative advocates. Each update is drafted after discussion with lobbyists and consideration of policy issues that are current and/or will most likely appear the following year.

**COORDINATION OF THE LEGISLATIVE PROGRAM**

---

Immediately after a department or the City Manager's Office (CMO) learns of governmental action potentially affecting the City, internal communication and coordination to analyze the action begins. If warranted, a formal City position and advocacy actions are developed for recommendation to the City Council or City Manager. Departments are urged to proactively identify legislation of importance to the City, and to communicate with the CMO.

At this point, action can proceed in either of two ways:

1. If the Council has previously adopted a legislative guideline relevant to the legislation, the CMO may act by engaging in the advocacy methods noted on page 6.
2. If there is no relevant legislative guideline or Council direction related to a potentially impactful bill, if the issue is politically controversial, or if there is significant local

---

<sup>1</sup> <sup>1</sup> If staff recommends no guideline changes - after a review of the current year's approved guidelines, Council's adopted Citywide priorities, and a discussion with lobbyists - the priorities from one year will carry over to the next year with no need to return to Council for a re-affirmation of previously approved guidelines.

**Advocacy Process Manual**  
**2020 update**

interest in the issue, the proposed legislation is referred to Council for direction. (See *Legislative Advocacy*, on page 5)

**THE ROLE OF THE CITY COUNCIL**

---

The City Council has ultimate responsibility for determining the City's position on legislative issues. The Council's specific responsibilities include:

- Through a review process and staff suggestions, establish state and federal legislative priorities
- Meet with the City's State and Federal legislative advocates as needed or desired to best represent the interests of Palo Alto
- Work with external entities on issues of shared regional policy concern
- Determine positions on resolutions proposed for adoption by the League of California Cities, the National League of Cities, the Santa Clara County Cities Association, and similar regional entities, as requested
- Assume an active advocacy role with legislators on behalf of the City. This may include travel to Washington, DC and/or to Sacramento. Any such travel will be consistent with current City travel policies.

**THE ROLE OF THE CMO**

---

The CMO, through the City's Intergovernmental Affairs Officer, is the central coordinator of the City's legislative program. The responsibilities and activities of the office include:

- Ensuring the consistency of legislative action throughout the City
- Serving as a clearinghouse and record keeper for all legislation of interest and monitoring bills of interest to the City
- Coordinating contacts and communications with legislators and their staff
- With departmental assistance, evaluating proposed legislation that may affect the City
- Disseminating information on public policy items of interest to City departments
- Directing and overseeing the City's lobbyists, including setting priorities for action that are consistent with Council direction
- Preparing advocacy letters for the Mayor's signature
- Maintaining the City's Intergovernmental Affairs web portal

## **Advocacy Process Manual 2020 update**

- Serving, as needed, as the liaison to stakeholder groups, legislative offices, and local jurisdictions concerning legislative activities
- Coordinating the regular review of Legislative Guidelines and presenting them at the Policy and Services Committee
- Coordinating, briefing, and providing support to Council members for visits with State and/or Federal legislators, as requested

### **THE ROLE OF CITY DEPARTMENTS**

---

Active departmental participation is essential to the success of the Legislative Program. Departmental employees are the subject matter experts who can provide technical assistance and unique insight into issues potentially impacting the City. Responsibilities of the departments include, but are not limited to:

- Informing the CMO of policy issues of importance to the City and any specific bills they become aware of that may impact the department
- Designating key contacts within the department or division who are responsible for evaluating legislation and/or assisting the Intergovernmental Affairs Officer with legislative analysis and advocacy letters
- Suggesting organizations, individuals, publications, and/or legislators who may be allies in advocating the City's position on certain legislation

### **CITY ADVISORY COMMISSIONS AND COMMITTEES**

City employees who are staff or liaison to Council appointed advisory commissions and committees should encourage those bodies to bring to the CMO's attention any proposed legislation for which they recommend a position or wish the CMO to track.

Any advisory commission or committee, or member of any such body, that wishes to represent the City in meetings or communications with a legislator or legislative staff member while under the auspicious of the commission or committee must first coordinate with the CMO. Any engagement while in an official City capacity requires approval from the City Manager, to ensure adherence to the City's guidelines, process, and current Council priorities. City Manager approval is not necessary for commission or committee members engaging legislators in a personal capacity, when not representing the City.

### **UTILITIES DEPARTMENT**

The Utilities Department maintains its own set of legislative guidelines, due to the heavily and separately regulated nature of the City's utilities lines. These guidelines are reviewed, discussed, and approved by the Utilities Advisory Commission, then approved by the City Council. The Utilities legislative guidelines shall not conflict with, but will compliment, the City's guidelines. Advocacy actions that squarely and solely affect the Utilities

## **Advocacy Process Manual 2020 update**

Department (ie: an increase in utility rates, a change in departmental operations or policies, or additional work for staff of only the Utilities Department) and that conform with approved legislative guidelines, may be approved by the Director of the Utilities Department.

### **LEGISLATIVE ADVOCACY IN SPECIAL CIRCUMSTANCES**

---

The Council is the official voice of the City of Palo Alto and the final authority for determining legislative positions. The processes outlined below reflect instances when staff has no prior Council authority, or the issue is controversial, or is a current item of significant community interest.

1. Staff will place the item on a City Council agenda, including a specific bill number, if any, an analysis of the item, and a recommendation if warranted, for Council deliberation
2. Staff will follow the direction from Council related to the specific item. If the direction is to oppose or support a bill, the CMO will relay the position to the City's lobbyist, who will take any of the advocacy methods noted below

Importantly, due to the ever evolving and often fast pace of legislative amendments, it is rarely possible for staff to first appear before the Policy and Services Committee seeking direction. Timing is also a reason why staff receives Council approval on legislative priorities in advance of the next state legislative session.

### **SIGNATURES ON LEGISLATIVE COMMUNICATION**

---

Letters and other communications expressing the City's position will customarily bear the signature of the Mayor. However, if the legislation's principal impact is on the City's operating procedures, the communication may be signed by the City Manager. In order to keep the Council and others informed of all City communication on legislation, copies of the letters will either be distributed to the Council, or placed on the City's Intergovernmental Affairs web portal, or both.

### **LOBBYING BY CITY PERSONNEL**

---

Any meetings or communication with State or Federal elected officials must be done in a coordinated way to ensure consistency of messaging, accurate information and record keeping, and sharing of resources. Therefore, any departmental staff, including department heads, or City contractors, wishing to directly engage with a state legislator, member of Congress, legislative staff, or wishing to testify at a committee hearing shall first work with the CMO's office.

**Advocacy Process Manual**  
**2020 update**

**ADVOCACY METHODS**

---

Drafting position letters is one advocacy tool, best used in conjunction with others. The City Council, City Manager, Intergovernmental Affairs Officer, and lobbyists may use any, or a combination of the below additional advocacy methods:

- Calls to policymakers, their staff, or legislative committee staff
- Meeting with legislators and their staff, stakeholders, and other groups active on the same issue or bill
- Testifying at a committee hearings regarding the City’s position and/or concerns
- Building coalitions with like-minded entities

**CITY COUNCIL MEETINGS WITH OTHER ELECTED OFFICIALS**

---

From time to time, Council meets with the City’s County, State, and/or Federal representatives, whether in Palo Alto or in other towns. These meetings are an important component of building legislative relationships and sharing issues of significance to Palo Alto. These meetings should be scheduled at the appropriate times during the respective legislative calendars; City staff will work with the City’s lobbyists, as needed, to facilitate any such meeting.

**STATE LEGISLATIVE TIMELINE**

---

Generally, the State legislature is in session from December to August or September; bills must be introduced by February of each year. The Governor has 30 days after the end of session to sign passed bills, depending on when the bill passed. The CMO will convey specific legislative deadlines to the City Council as requested.

**CITY-SPONSORED STATE LEGISLATION**

---

If a department or Council member would like the City to sponsor a state bill, meaning the City asks a legislator to introduce a bill making changes to state law at our request, it’s important to note the timing. The general ideal timeline, and the process for such action, is noted below:

*October:* The bill idea is discussed internally, with the CMO, the affected department(s), the City’s lobbyist, and possibly, the City Attorney’s Office. Potential allies are also discussed.

*November:* A fully vetted bill idea, including a summary document and amendments to the affected code section(s), is brought to a meeting with the potential author. If needed, more than one meeting with more than one legislator takes place until an author is secured.

**Advocacy Process Manual**  
**2020 update**

*December-February:* City staff and lobbyist work with the author's office on the specific language, as needed. The bill is sent to the State's Legislative Council's Office for official drafting, and the bill is formally introduced.

*February to October:* City staff and lobbyist work on advancing the bill, to include testifying at committee hearings, meeting with proponents and opponents, discussing amendments and strategy, meeting with the author's staff and the Governor's staff crafting letters and advocacy pieces, and the like.

Due to the potential workload of bill sponsorship and technical specificity required to craft bill language, it is very important that the affected department(s) designate one or two staffers who can actively assist the CMO throughout the life of the bill. For specifics about the timeline and actions required, please contact the Intergovernmental Affairs Officer.