



LEADERSHIP ACADEMY

A COURSE FOR LOCAL ELECTED OFFICIALS OR
OTHERS ASSOCIATED WITH STATE AND LOCAL
GOVERNANCE



CALIFORNIA LOCAL ELECTED OFFICIALS

Calelecteds.org

INTRODUCTION

CLEO ACCREDITATION THROUGH CALIFORNIA POLICY CENTER

A project of the California Policy Center (CPC), California Local Elected Officials (CLEO) is a membership organization that supports, advises and educates local elected officials building durable networks throughout California's thousands of cities, counties and school and special districts. CLEO members are elected and appointed officials who stand for financial sustainability, government transparency and personal liberty.

In 2022, CPC launched a certificated 15-session Leadership Academy course for local elected officials or others associated with state and local governance. The course is a self-paced, graduate-level seminar-style class on everything from first principles and public policy to constituent services and public-finance literacy. Anyone can participate in the curriculum; it is not exclusive to members. Those who complete the program will gain knowledge, insights and tools to create deep and meaningful change in their cities, counties and school districts benefiting not only their constituents, but the entire state of California.

The course curriculum is currently 15 modules accessible through a website operated by CPC. Each module consists of:

- A 15-30 minute video by a subject matter expert relevant to the module and moderated by CPC staff;
- Brief overview of the module's subject matter;
- Ten related policy questions to consider and contemplate that may or may not be addressed in the video;
- Links to readings generated or compiled by CPC staff on the module subject;
- Optional post in online forum reviewing lessons learned.

Upon completion of the course, the participant will receive a credential from California Policy Center confirming their completion of the course which they can place on their resume, social media profiles (i.e. LinkedIn) or other personal biographies. They will be invited to join future CLEO fellow calls, Facebook groups, mentoring requests, etc. CLEO strives to be the best 501(c)(3) training platform for local elected officials in California, something that can be done in the office or from the comfort of their own home and — just as important — on their own schedule.

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*As a 501(c)(3) nonprofit, CPC is limited to providing education and advocating on policy issues without endorsing a particular candidate, party or measure.



CLEO Leadership Handbook
Module 1: First Principles & Constitutional Governance
Ryan Williams interviewed by Will Swaim

OVERVIEW

Being an elected official is an unforgiving job. It is meant to be an act of service to the public, representing not just those who share similar viewpoints, but the entire constituency.

Representing the people in the midst of the government bureaucracy is a very difficult task. Ensuring that government services are running well and efficiently using taxpayer dollars are some of the important responsibilities that come with being elected.

As an elected official, you will be tasked with many difficult jobs and problems. Among them, working on a myriad of issues, many of which you might not be familiar with. It is important to remember that you represent the constituency that voted for you and must do everything you can to best represent that constituency.

As an elected official, one must be effective in working as part of a team to ensure that the vision for the future that you want is developed. This is based on the constitutional principle that the people are inherently endowed with the authority over their government. Holding elected office is an honor and those voted to such positions have a duty to the people they serve. When office holders understand first principles and treat their fellow citizens with respect, local government can be a trusted and respected benefit to the community.

REFLECTION QUESTIONS

1. What is the purpose of government? What should people expect from their government?
2. How does one decide whether the government should do X activity?
3. If the government decides to do X activity, what level of government should do it?
4. How much of activity X should that level of government do?
5. What does separation of powers or different branches of government look like at a local level (i.e. legislative, executive, judicial)? Is there some combination of powers that is unique to local government that is different from the state and federal government?

6. Is local government autonomous from the state or does it act on behalf or as an arm of the state?
7. How should elected officials treat their responsibilities in representing the people?
8. How can a small “r” republican form of government work at the local level?
9. How do police and taxation powers work and what are their bounds?
10. What can or should be delegated to administrative or bureaucratic bodies and how are they overseen?

ADDITIONAL READINGS

- What Would a Centrist Do? Edward Ring, August 19, 2021.
<https://californiapolicycenter.org/what-would-a-centrist-do/>



CLEO Leadership Handbook
Module 2: Powers, Authorities, & Duties of Local Elected Officials
Will O'Neill interviewed by Will Swaim

OVERVIEW

Before you consider running for local office, it is important to be familiar with the responsibilities involved once elected. This information can usually be found on local elected officials' respective websites.

Understanding the powers, authorities and duties of local elected officials is critical to the operation of an effective government. Local government is where decisions are made that directly affect the lives of families and businesses. Citizens can attend, listen in and possibly have an influence in local government decisions by participating in public meetings. This is where local projects are voted on, contracts are awarded, money for programs are authorized, and salaries and benefits are approved. The posted agenda allows citizens to know ahead of time what is going to be discussed or voted on at an upcoming meeting.

Local government oversees essential and necessary constituent services. Some of the services they oversee include responsibilities for:

- Police
- Fire
- Transportation
- Parks and recreation
- Education
- Public facilities such as libraries and community centers
- Street construction, maintenance and signage
- Housing services — including zoning and permitting
- Garbage, sewer and water service
- Other local services including business licenses and permits

The powers and duties of local elected officials are set by state and federal statutes as well as the state and federal constitution. State governments similar to the federal government have executive, legislative and judicial branches and they take an oath to operate within the boundaries of their state constitution. The main function of the state legislature is to propose and vote on bills in line with their constituents' values.

For the vast majority of locally elected positions, you will not be making change at the state or federal level. For most locally elected positions, you will be a part of a legislative body and will be advocating on behalf of your local constituents.

Advocating for your constituents can look different for every office. For the School Board, it may be dedicating funds for after school programs that are currently underfunded. For the City Council, it may be asking to implement a stop sign at the corner of a street. For the County Board of Supervisors, it may be improving the condition of county roads.

As an elected official you have a unique opportunity to bring certain issues to light and have the opportunity to represent your community in a legislative body. This opportunity should not be taken lightly.

Following the suggestions below will assist you in being in touch with the community and the issues facing them:

- Review your meeting's agenda once it is posted, which is usually at least 72 hours before the meeting. This will allow you the opportunity to talk to staff, members of your legislative body, or the community about items on the agenda that are of concern, and will allow you to be well prepared to respond or vote at the meeting.
- Be familiar with the local news stories and media in your community. It may seem obvious, but if you are not aware, you might be caught off guard when a constituent brings up an issue.
- Be out in the community meeting with your constituents as often as possible. Whether it is holding office hours or walking door to door, it is imperative that you are meeting with your community members. It is very easy to become insulated from the public.
- Attend as many community meetings as possible. If your schedule does not allow you to attend certain local meetings regularly, designate a representative to keep you aware of the important issues.

Elected officials must also be careful to have the highest integrity when carrying out their duties. They must avoid any type of conflict of interest. Sometimes they can avoid a possible conflict by recusing themselves from a vote. Conflicts might occur from a family member, business associate, personal investment or business investment. Campaigns also require attention to detail to avoid unethical situations.

Campaign funding is an area that requires meticulous detail. Campaign funds can only be used for legitimate campaign purposes and not used for any type of personal

expenses. Transparency is critical here! A good treasurer can help candidates avoid illegal campaign financing issues. Accidental campaign violations are still campaign violations.

Campaign communications are also very important. They should be truthful and respectful. A candidate's positions, voting records and endorsements are fair game, but should still be communicated appropriately and honestly. A candidate's personal life should not necessarily be shared unless it is relevant to their elected position or so egregious that it needs to be communicated to the public.

It is important to remember that you will primarily be dealing with local issues as a locally elected official. This affects the way you should approach a campaign and should dictate what you focus on when elected.

If you are able to work with government staff to advance the interests of your district, then you can be successful. Understand that change will not happen overnight and collaboration and compromise are necessary when making change in your community.

REFLECTION QUESTIONS

1. What are some of the ways the public can participate in local government?
2. Why are local government meetings required to post an agenda?
3. Give three examples of services that the local government oversees.
4. Who sets the powers and duties of local government officials?
5. What is the main function of the state legislature?
6. What are some examples of when elected officials should recuse themselves?
7. Are there any situations where you can use campaign funds for personal expenses?
8. Why should candidates hire treasurers?
9. Is it ethical to share a candidate's previous voting record?
10. Is it ever appropriate to share information regarding a candidate's personal life?

ADDITIONAL READINGS

- Roles and Responsibilities of Local Government Leaders, MRSC Empowering local governments, MRSC.org.
<https://mrsc.org/Home/Explore-Topics/Governance/Officials/Roles-and-Responsibilities.aspx>
- States and Local Government in the United States of America, StateRecords.org
<https://staterecords.org/stateandlocalgovernment.html>



CLEO Leadership Handbook
Module 3: Managing Public Sector Human Resources
Jim Righeimer interviewed by Will Swaim

OVERVIEW

Just as it is true in the private sector, it is true in the public sector — personnel is policy. However, government labor laws are different from the private sector. An elected official will likely operate under two separate sets of laws in regards to their employees. One will deal with civil servants hired as a part of the institution through the department, counsel or office. The other deals with political staff that are often at-will employees. It is incumbent on you to understand these distinctions and to be aware of the complex labor laws that you will have to navigate as a newly-elected official.

Hiring staff to reflect your agenda is a top priority. They do not have to agree with your politics completely, but they should share some of your ideology and goals, and have some understanding and sympathy for the reasons that you may act or respond in certain situations.

A good public servant will set professional boundaries with staff who assist in campaigns, work with the elected officer or act in a consulting position to avoid impropriety or interfering with personal or political issues. Every entity will have established laws and rules on nepotism and considerations for hiring or contracting with close friends or associates.

Like the private sector, the public sector has full-time staff, part-time staff, seasonal staff, contractors and volunteers. It is important to know the difference between these different employment types and what you should expect out of them.

Full-time staff work every day for you and they should be tasked with the most in-depth tasks that may take some time to complete.

Part-time staff are usually hired to assist full-time staff with their duties. They should not be relied upon to deliver larger plans and ideas — this usually falls on the full-time staff. Seasonal staff fall into this category as they may come to help with a particular task during a busy time of the year, i.e. counting ballots in a county registrar or clerk's office or processing tax payments.

Contractors are hired to assist the municipality with something they are unable to do in-house or when it would be too expensive to keep the personnel hired year-round. The tasks that can be contracted are endless and depend on which municipality one is a part of. It is important to ensure that the contractor understands their responsibilities and

limited authorities. A detailed timeline ensures that their tasks are accomplished in a timely manner.

Volunteers are often brought on to assist with low-level tasks that staff does not have time for, but is not important enough for a contractor. Interns are a part of this class unless the municipality has the budget or wherewithal to pay their interns. Many interns may have specific requirements and restrictions based upon their school's program.

It is important to know who your civil servants are and who your at-will employees are. Each group has a distinct and different set of rules around hiring, overseeing, promotions, salary and dismissal. When first elected, it is a good idea to take a look at the notes on file for the personnel that currently work at the government you oversee. Understanding past issues or certain tendencies will ensure better success when working with them. Make sure to regularly review and assess staff to ensure that they are continuing to perform well for the taxpayers.

Common terms to know:

- CBA: Collective Bargaining Agreement, or a written legal contract between an employer and a union
- MOU: Memorandum of Understanding
- MOA: Memorandum of Agreement

Bargaining with public unions are a critical part of being an elected official. An elected official will come across a lot of bargaining with unions and other entities. A list of what is bargainable is listed on the National Labor Relations Board, <https://www.nlr.gov/about-nlr/rights-we-protect/the-law/bargaining-in-good-faith-with-employees-union-representative>

When bargaining, the elected official must remember that they are bargaining with taxpayer money. It should be spent prudently and responsibly.

REFLECTION QUESTIONS

1. If bureaucratic staff is not listening to direction from your elected body, how would you handle that?
2. If your fellow elected official hires their nephew to a staff position they are not qualified for, would you have any recourse?

3. If there is a policy dispute between staff and elected officials, whose direction should the entity follow?
4. Should you meet regularly with your Human Resources representative? Why or why not?
5. What is your view on government salaries for staff? What is the reasoning of having higher or lower salaries for staff?
6. How do government labor laws differ from private sector labor laws?
7. Being an elected official, how would you approach your relationship between yourself and staff?
8. How would you approach collective bargaining with a local union?
9. What is the difference between a CBA, MOU and MOA?
10. What is the most important thing to remember when collective bargaining?

ADDITIONAL READINGS

- How Much Do California's County Workers Make? Edward Ring, July 29, 2020.
<https://californiapolicycenter.org/how-much-do-californias-county-workers-make/>
- Testimony on S. 1120 – Collective Bargaining For Law Enforcement in Idaho. Editorial Staff, March 11, 2021.
<https://californiapolicycenter.org/testimony-on-s-1120-collective-bargaining-for-law-enforcement-in-idaho/>
- The Robot Revolution – How Union-Backed Policies Destroy Jobs for Humans. Steven Allen, August 13, 2025.
<https://californiapolicycenter.org/the-robot-revolution-how-union-backed-policies-destroy-jobs-for-humans/>



CLEO Leadership Handbook
Module 4: Open Government Laws, Brown Act, Ex Parte
Communications et. al.
Greg Rolen interviewed by Will Swaim

OVERVIEW

Transparency laws are important to ensure that the public understands and has full access to their elected officials and fair process. Every government has some sort of open government laws.

It is important to educate candidates and elected officials on how to deal with open government and transparency laws as well as public record requests. Public officials must also understand how to coordinate with general counsel.

General counsel will be an expert in the Brown Act and what would qualify as a violation of this act. Make sure to consult with counsel before attending any event with other elected officials of your body. The Brown Act ensures that public business is not being decided without transparency.

Open Government Laws support government transparency and accountability by allowing citizens access to government documents. This public oversight helps to encourage informed and involved constituents. These laws were passed in response to increased concerns with the secrecy connected to government policy development and decision making. They apply to federal, state and local governments.

Freedom of Information Act (FOIA) is a federal law that requires either full or partial disclosure by the U.S. government of previously unreleased information and documents upon request. This law was passed in 1966 to require the government to be transparent with certain exceptions, such as national security.

California Public Records Act (CPRA) was passed in 1968. CPRA is a law specific to California that requires governmental records requested by the public to be disclosed unless there is a reason not to disclose that outweighs the benefit of public disclosure. There are specific exemptions; most have to do with individual rights of privacy and confidentiality. There are also several government exceptions regarding confidentiality. An example would be for a pending criminal investigation.

The Brown Act, also known as California's "sunshine" law, requires local government business to be conducted at open and public meetings, except in very limited situations. The name comes from its author, former Assemblymember Ralph M. Brown. The act was passed in 1953.

The Brown Act guarantees the public's right to attend and participate in meetings of local government either in person or virtually if circumstances do not allow for in-person attendance. Some examples of local government meetings covered by the act include councils, boards, commissions and committees. The location where the meeting is held must be free and accessible to the public and an agenda must be posted within a certain amount of time so that the public knows what will be discussed. Depending on the type of meeting, 24 to 72 hours notice is required. The Brown Act also specifies what items can be discussed in closed session (privately) rather than in public. The most common items that are allowed to be discussed during closed session are litigation, personnel matters, labor negotiations and real estate negotiations.

If a Brown Act violation occurs, a person can ask the courts or the district attorney for an order to prevent any future violations. If the Brown Act violation actually results in action being taken, then the court can be requested to send a “cure and correct” demand letter. If only the Brown Act is violated but no action is taken then a “cure and correct” is not appropriate; instead only an order to prevent future violations would be requested.

An ex parte communication is a one-sided communication with a judge. It can be in writing or an oral communication and is usually involved when there is a pending lawsuit. It often happens without the other side being aware of the communication. “Ex parte” is a Latin phrase meaning “on one side only; by or for one party” (https://www.courts.state.hi.us/self-help/exparte/ex_parte_contact). Ex parte communication is often used when it is necessary to issue orders without waiting for a response from the other party to the lawsuit. Often these are temporary orders until a hearing can be held. An example would be a temporary restraining order.

If an improper ex parte communication occurs and there is prejudice to the other party, it can be remedied by the judge recusing himself. But, if there has not been prejudice, no remedy is required.

REFLECTION QUESTIONS

1. Why is FOIA important to local government officials?
2. When would the California Public Records Act (CPRA) not apply?
3. Why is the Brown Act necessary?
4. When would it be in violation of the Brown Act if you and a majority of your colleagues attend a celebratory event together?
5. When would a conference call violate the Brown Act?

6. What are the requirements under the Brown Act to attend a meeting remotely?
7. Under the Brown Act, what are some examples of business that can be discussed in closed session?
8. When is a court required to issue a "cure and correct" letter as a result of a Brown Act violation?
9. If you are unsure whether a meeting violates the Brown Act, who should you contact?
10. When is ex parte communication used? What is an example?

ADDITIONAL READINGS

- When Approving a \$7 Billion Bond Proposal, Did The LAUSD Board Violate The Brown Act. Edward Ring, August 19, 2020.
<https://californiapolicycenter.org/when-approving-a-7-billion-bond-proposal-did-the-laUSD-board-violate-the-brown-act/>
- Unions Foiled in Plot to Evade Open Government Law. Kevin Dayton, October 5, 2016.
<https://californiapolicycenter.org/unions-foiled-in-plot-to-evade-open-government-law/>



CLEO Leadership Handbook
Module 5: Transparency & Accountability
Mark Moses interviewed by Will Swaim

OVERVIEW

Maintaining transparency and accountability as a public official is critical. Transparency refers to conducting activities or performing duties in an open manner, while accountability refers to being able to provide credible reasoning for one's actions.

Transparency laws have huge benefits for the public. Elected officials should not be making decisions outside of the public eye. The Brown Act helps with transparency in California, since government entities must hold public meetings when a majority of the council or board meets and makes decisions.

Ideally, public entities will post an agenda with items to be discussed or voted on and will allow for public comments before voting. To be transparent, information should be readily available to the public prior to a meeting. The public must feel like they have had an opportunity to provide input regardless of the outcome of the vote. There are different posting requirements depending on the type of meeting.

The public's right to access information about the decisions, policies and actions of elected leaders is important at all levels of government.

Transparency laws help achieve accountability and prevent abuse of power as well as assisting the public in measuring the performance of those elected to serve. It is critical to hold elected officials accountable for their actions.

Some discretion may exist when it comes to actual governing and is helpful when some flexibility is necessary. However, too much discretion can be problematic since it may lead to the policymaker's preferences in making policy decisions, which can lead to arbitrary and inconsistent decisions based on officials' personal belief systems. This can be especially problematic and can result in a lack of public trust. Rules in conjunction with some limited discretion will allow the public more transparency and consistency when it comes to public decision making. These rules or checks should be in place to provide accountability when there is some discretion.

Accountability is a critical part of any business or organization, but it is especially important in local government. There must be responsible use of government resources in order to provide the necessary community services.

Accountability ensures that the government is following laws, regulations, and internal policies or procedures. Local governments must follow state and federal laws and guidelines, but more importantly, they answer to their constituents. Government accountability maintains the trust between government officials and citizens. It is important to avoid even the slightest appearance of impropriety. If you lose the trust of your constituents, it will be very difficult to govern effectively.

The ultimate accountability takes place when the public servant comes up for election. Constituents hold elected officials accountable when they go to the ballot box or receive a ballot in their mailbox.

REFLECTION QUESTIONS

1. What is the difference between transparency and accountability?
2. What is the purpose of the Brown Act?
3. Why is it important to be transparent with your constituents?
4. As an elected official, what are some ways in which you can show transparency?
5. What happens when elected officials are not transparent?
6. How can one practice accountability as an elected official?
7. Why is it important to hold public officials accountable and what is the ultimate way to hold an elected official accountable?
8. What is problematic about using discretion when governing?
9. What type of checks can be put in place to protect the public from too much discretion by lawmakers?
10. What conditions are most likely to support a culture of transparency and accountability in a public agency?

ADDITIONAL READINGS

- Transparency: The Legislature Giveth and The Legislature Taketh Away — Simultaneously! Craig Alexander, June 5, 2017.
<https://californiapolicycenter.org/transparency-giveth-taketh/>
- School Transparency Wars. Larry Sand, March 4, 2022.
<https://californiapolicycenter.org/school-transparency-wars/>

- In Search of Government Union Transparency. Edward Ring, July 17, 2018.
<https://californiapolicycenter.org/in-search-of-government-union-transparency/>
- More Unaccountability from the Education Establishment. Larry Sand, November 15, 2017. <https://californiapolicycenter.org/unaccountability-education-establishment/>
- School Choice, Uber and Accountability. Larry Sand, April 4, 2017.
<https://californiapolicycenter.org/school-choice-uber-and-accountability/>



CLEO Leadership Handbook
Module 6: Intergovernmental Cooperation with Quasi, State & Federal Governments
Will O'Neill interviewed by Will Swaim

OVERVIEW

Intergovernmental cooperation is an agreement between two or more local governments or quasi-governmental entities to achieve common goals.

Intergovernmental contracts or agreements are created when one or more government units purchase services produced by another government or quasi-government unit. The responsibility for delivering a government service is transferred from one government entity to another entity.

These intergovernmental arrangements can be between cities, counties and other governmental entities and are often created to provide less expensive and/or more efficient local government services. These agreements are formed to solve mutual problems or concerns. In some cases, substantial cost savings are achieved when duplication of administrative services and/or equipment is reduced or eliminated.

There is a benefit or need for cooperation when there is an issue or service problem that cannot be handled locally or can be more effectively handled by cooperating with nearby entities. These agreements can enable local governments to provide services to their constituents that might otherwise be unaffordable or outside of a small government's budget. Basic services like law enforcement, fire and other emergency services, or other community services such as libraries, parks, public transit, street sweeping or recycling services are often provided. Cooperative agreements might also be used to share government employees or buildings.

Intergovernmental agreements can also provide greater stability of services and additional flexibility. However, sometimes you lose accountability and personalization when you enter into agreements and do not provide the services directly or locally.

The types of agreements between government entities can vary. There are government-to-government contracts. An example would be where one jurisdiction purchases services from another. In some cases, several jurisdictions enter into a joint agreement to pool financial resources, assets and personnel to provide services. Before entering into these agreements, there should be a cost-benefit analysis. The benefits will not always outweigh the costs. Many times it makes sense for smaller entities since they can often provide better and more efficient services when they join forces with other small or large entities. These arrangements can be simple and informal or very

complex and formal. A written contract is best, but some agreements can be based on verbal contracts.

An example of intergovernmental agreements to receive services rather than provide them is insurance pools through local government associations and joint purchasing cooperatives. It is not uncommon for Boards of Education to participate in these types of arrangements.

There are also agreements that can involve a government and private entity, which is a slight variation to an intergovernmental contract since you are involving a private company or business rather than two government entities. An example is when the City of Placentia established [Placentia's Fire and Life Safety Department](#). By creating their own department and breaking their contract with the Orange County Fire Authority, the city was able to save over \$2 million annually and make their city much more financially viable and stable. This was not an easy feat and would be very difficult to duplicate today under current regulations in California.

You can also have intergovernmental cooperation with Quasi-Governmental Organizations (QGOs), which are organizations that have both public and private attributes. These are also called hybrid organizations since they do not fit neatly into either category. There are a variety of QGO/hybrid organizations. An example of a QGO is a private nonprofit organization run by a board of directors composed of government officials or directors appointed by a government entity.

Some issues to consider before entering into an intergovernmental contract:

- Make sure the agreement is affordable and makes financial sense.
- Verify that your contract or agreement is legal under local and state ordinances and statutes as well as the state constitution.
- Formal written contracts are safer than informal agreements. Informal agreements can allow room for interpretation which can be disadvantageous to your government entity. Intergovernmental cooperation is an agreement between two or more local governments or quasi-governmental entities to achieve common goals.
- Constant monitoring of existing contracts is important to make sure that they still make sense and are delivering the intended results.
- If drafted well, intergovernmental contracts can make smaller jurisdictions more viable without loss of autonomy or local control.
- Local government entities should be careful to provide for adequate accountability and transparency in the agreement.

REFLECTION QUESTIONS

1. What are five services that can be provided by intergovernmental agreements?
2. How do intergovernmental contracts make small jurisdictions more viable without loss of autonomy or local control?
3. When does it make sense for intergovernmental contracts to share government employees?
4. What are some examples of intergovernmental agreements between government and private organizations?
5. Must these agreements be in writing and what are the advantages of written contracts?
6. How would you approach a conflict between governmental agencies?
7. In what ways does cooperation and communication between agencies promote efficient use of taxpayer money? How can you foster this?
8. Currently, what governmental agencies in your government have a difficult time getting along?
9. Do you think it is important to meet with each government department head on a regular basis? Why or why not?
10. How do you take into account the needs of constituents when discussing conflicts between governmental agencies?

ADDITIONAL READINGS

- Another California Local Government Gives Unions a Contract Monopoly to Get State Funding. Kevin Dayton, January 2, 2017.
<https://californiapolicycenter.org/another-california-local-government-favors-union-s-as-a-condition-to-get-state-funding/>
- How California's State and Local Government's Can Save \$50 Billion Per Year. Edward Ring, May 12, 2015.
<https://californiapolicycenter.org/how-californias-state-and-local-governments-can-save-50-billion-per-year/>
- California's State and Local Government Spending Nearly \$400 Billion Per Year, Edward Ring, July 16, 2013.

<https://californiapolicycenter.org/californias-state-and-local-government-spending-nearly-400-billion-per-year/>

- How Big are California's State and Local Governments Combined? Edward Ring, June 21, 2013.

<https://californiapolicycenter.org/how-big-are-californias-state-and-local-governments-combined/>

- California Policy Center Study Estimates California's Total State and Local Government Debt Exceeds \$1.0 trillion. CPC Press Releases, April 30, 2013.

<https://californiapolicycenter.org/cpc-study-estimates-californias-total-state-and-local-government-debt-exceeds-1-0-trillion/>



CLEO Leadership Handbook
Module 7: Prudent Media Engagement
Kevin Kiley interviewed by Jackson Reese

OVERVIEW

You are now an elected official and a public servant responsible for making sure government works best for the people who elected you — your constituents. For the campaign, you likely used the media to great effect to point out all the problems in government that could be solved or mitigated with your leadership. An effective media strategy will assist you in that goal through your term.

While you are in control of your direct communication strategy by sharing your policy agenda with your constituents through newsletters, social media posts, town halls or any other commentary, you have limited control over how the media will cover your tenure and react to any number of situations or controversies that may arise. Perspective and discipline will be two of your greatest assets to project the message you want to send into the public domain and control narratives that counter your objectives.

Your messaging also must be concise, consistent and relatable to the average voter who spends very little time thinking about what is going on at city hall or the local elected boards. Indeed, most voters just want to make sure that the schools are open for their kids, the potholes on their street are filled, and they are safe in their neighborhoods. Yet, the press does not sell papers based upon a well-functioning community; they often seek out conflict or “if it bleeds, it ledes” kinds of stories. A disciplined media strategy will reduce the probability of the media improperly reporting on you or distort your priorities.

Understanding that the press is adversarial and contrarian by nature will help you keep a healthy guard up around reporters. They are constantly on deadline and often overwhelmed by any number of stories. Their job is to sniff out the most interesting angles, not necessarily the most important information. And while some reporters are specialists in various issues, most are generalists and will not take the time for those things that require intense study or background. It is an exceptional reporter who is willing to put in the time and effort to properly cover a story.

Additionally, there is limited space in the local paper or the nightly news broadcasts, so editors make decisions every day on what to cover leaving a lot of good material on the cutting room floor. The following are a few key concepts when sharing information and responding to any number of media requests.

Framing the Issue – Public policy often requires a lot of background and nuance, things that are lost in headlines. Most policies do not stand on their own, but are intertwined with other issues and any decisions to modify a policy will have an impact on others. Having a clearly delineated set of priorities will allow you to set the table for any number of actions you must take to address the most pressing problems in your community and how the trade-offs may roll out.

Be clear on why your policy prescriptions are important and how they will impact other decisions and priorities. Outlining the problem, the context and various responses as you showcase your preferred policy prescription will set you apart from other political actors and could be done through regular communications like a newsletter or a press release if a decision is urgent or imminent.

For difficult issues, consult with trusted advisors and experts on your response and allow them to critique and coach you.

Educating the Media – The better your reporters and editors understand your credentials, experience and interest in a policy issue, the more likely they are to write the stories you would like your constituents to see and frame it or quote you more often and accurately. Develop a comprehensive communications strategy that combines traditional and social media channels, including bloggers, podcasters, social media aficionados, etc., and provide them with the same media packages you would give the traditional media sources.

Make time for building relationships with reporters and editors. You will need to engage them regularly. Provide them with relevant information, considerations, facts, charts, quotes and other material you have been preparing for public consumption to make their jobs easier in reporting stories. Introduce them to subject matter experts or others who may have a preferable perspective or outlook. Press conferences in front of strategic locations will also aid you in getting the message out.

If there is a certain issue on which you feel they need more context, meet with them in an editorial board meeting or have off-the-record or background conversations.

Always Tell the Truth – Honesty is always the best policy, even if it is not convenient or helpful. If you are in a situation where the facts are not on your side, refrain from commenting and consider letting the story play out rather than engaging in fabrications or spin.

Sometimes background or off-the-record comments can provide insights and context without tying your name to the story. If a comment must be made on a sensitive or controversial issue, be simple, restrained and direct without much detail. Even in

adverse circumstances, the truth will allow you to have more favorable outcomes to a story when facts may not reflect upon you well.

Depending on the situation, confidential information can often be protected when there are legal or public safety constraints. Where there are serious legal consequences, seek the advice of an attorney.

No matter what you do, always tell the truth.

Avoid Speculation, Rumor or Innuendo – When asked to comment on a story, stick to what you know firsthand or refer only to a trusted and believable secondhand source. Be circumspect in your prognosis and avoid over-sensationalizing any facts.

Controlling the Narrative – Remember, just because you have all the facts on your side, does not mean that you will always get the best media stories or win the policy debate in a public forum. However, your ability to thoroughly understand the policy and political landscape, ready to distill difficult issues in discreet and well-intended communications and interviews calmly at a moment's notice, will help them navigate an otherwise dizzying array of competing narratives.

If in an adversarial interview or on the hotseat, be ready with one line that outlines your priority and can be molded to fit several variable questions. Do not wander off topic or get distracted by another issue that is not relevant to the topic at hand. Anticipate the line of questioning and potential course corrections to keep the reporter on topic. Rhetorical questions can often give you enough room to articulate difficult conversations.

Preparing for an Interview – Know the reporter, producer or talent who will be interviewing you. Are they a friendly, neutral or hostile medium? Understand the boundaries of the interview in terms of subject, detail and timelines, including the urgency of the story, whether there is a hard deadline that needs to be met and how long the interview may last, including any preparation or travel time.

For the first set of interviews with a particular reporter or outlet, set appropriate ground rules and determine their need for any background. If you have any off-the-record requests, be upfront about them and make sure that there is an agreement and appropriate boundaries.

Trust is an important factor in any off-the-record agreement so be wary of divulging too much information if the interview is with someone whom you may be unfamiliar with or is hostile, combative or less than accurate in their reporting. Prior to the interview, anticipate if there will be any issues that you want to highlight or avoid? Consider outlining the issue you will be discussing during an interview. Prioritize your talking points with key statements and secure the sentiment you are trying to convey, keeping

them to under five or six ideas. Take every opportunity to creatively maneuver or link to your issue. If you are trying to persuade, rather than explain, consider personalizing the story. Often, reporters do not mind if staff or friends observe the interview. If you have a press secretary, public affairs specialist or communications director, they should participate, as appropriate. They may also be prepared to take notes, record the interview or post the experience on social media.

During an Interview – Preparation and discipline will lead to successful interviews and help you mitigate any landmines. It is wise to review the ground rules of the interview again before starting and discuss any background or off-the-record-agreements you may have, especially with reporters with whom you may be unfamiliar or those who are hostile or less than accurate in their reporting.

Think about breaking the ice at the beginning on a personal note where you can relate to your interviewer. Make sure that you are comfortable and have any relevant materials at hand.

If the interview is being recorded, consider recording the interview simultaneously for your own record of what was discussed, especially if the interview may be difficult. If you are on camera, make sure that there are no distractions with your hair, face, clothing, props or background. Speak clearly and restate questions in the answers where the reporter directs you (i.e., directly to the camera or to the reporter). If it is a live feed, make sure that you have access to audio through an earpiece and that your microphone works and lighting is adequate.

Following up on the Interview – If you have a staffer or friend observing the interview, have them provide you with any notes of the conversation and any commitments you made for further information.

Find out from the reporter or producer when a recorded segment will run if on radio or television or when it will be published online or in hardcopy. If it is published online, get the hyperlink.

If there are any inaccuracies with the story, depending on your relationship with the news outlet, you may want to follow up with appropriate information and a correction. If they are adversarial, you may consider producing a statement formally correcting the record.

Clip and highlight all the stories – video, radio, print and internet – that showcase your reform initiative in a positive light over your social media platforms to create an echo chamber effect enabling you to increase in free or “earned” media opportunities.

Social Media – You have the opportunity to speak directly to your constituents through social media platforms. As an elected official, you should be prudent in how you

approach the responsibilities and recognize that there are different rules for personal accounts and professional or government accounts.

Consider issues of privacy, confidentiality, open meeting and transparency laws, how your comments may reflect on colleagues, etc. Social media is another way to amplify your messages by reposting links to stories, studies, agendas and other meetings of importance to your audience.

Press Releases – Most governmental agents have a process for sharing news and updates, often through press releases and newsletters. Depending on the culture of your community, these could be very effective or less-than-useful. Smaller news organizations use these to boost their profiles and may copy your press releases or newsletters verbatim. Larger news outlets may cut and paste certain portions, so be clear on when you are being quoted so a statement from a staffer may be in context.

Common Challenges – You do not have complete control over what the media may or may not say about you and what you are trying to accomplish. An adversarial or contrarian reporter or editor may even try to sabotage you. However, being aware of counter-narrative traps will help you anticipate and avoid them.

The more prepared you are with quick responses to negative stories, the better you will be able to articulate various ways at approaching an issue, but emphasizing the best alternatives. Maintaining a well-framed internal document that houses topline information, answers complicated questions or addresses common objections allows you to be prepared for any discussion, especially if it is being recorded for posterity.

REFLECTION QUESTIONS

1. What is your media plan and routine for policy and political issues?
2. Are your social media platforms consistent with your branding and policy and political priorities, and are they compliant with related laws as they pertain to official and personal or campaign business?
3. Do you have access to personal, departmental or organizational staff who are affiliated with communications in any manner, including director of communications, public information officer, press secretary, social media specialist or chief of staff?
4. If ever caught in a major crisis, emergency or controversy, what steps would you take to build out a de facto press strategy?
5. What are the major and minor media outlets in your community (i.e., newspapers, radio stations, television stations, weeklies, blogs, etc.)?

6. Which publishers, editors and reporters do you have a relationship with?
7. Which media outlets do you watch, listen to or subscribe to?
8. Are there any outlets or platforms you need to follow or subscribe to?
9. How can you improve your interview style and practices?
10. How will you push for more earned media opportunities?

ADDITIONAL READINGS

- The American Media Has Betrayed America. Edward Ring, May 20, 2020.
<https://californiapolicycenter.org/the-american-media-has-betrayed-america/>
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<https://californiapolicycenter.org/will-the-media-ever-report-on-the-political-agenda-of-the-seiu/>
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<https://californiapolicycenter.org/the-media-and-teachers-unions-creepy-crass-actors/>



CLEO Leadership Handbook
Module 8: Effective Communication with Constituents
Lance Christensen interviewed by Jackson Reese

OVERVIEW

Sometimes elected officials need to be reminded that they report to their constituents. Their constituents put them in office and pay their salary. It is important to have a positive relationship with your constituents.

“The term constituent services is an all-encompassing term to describe services that an elected official provides to his/her constituents. The type of assistance provided may be specific casework, assistance with a government agency, liaison work between different levels of government, or development of potential legislation.”

(<https://www.modernrepublic.org/constituent-services>)

Constituent Services is a way to make sure that a government office is accountable to the people it represents and responsive to their needs. A responsible approach by an elected official would be to inform their constituents that services are available to them. Elected officials have the responsibility to show how they are working to do their part to ensure government agencies are not abusing authority, and taxpayer services are being delivered in an equitable and efficient way. This builds trust and goodwill with the community in an authentic and organic way.

An effective, well-organized constituent services program or effort sends a positive message to citizens that the government considers their needs a priority. It sends a strong message about accountability to constituents. Various avenues to communicate these service opportunities are available via public engagement such as booths at public events, regular digital communication, regular personal and staff attendance at civic meetings like chambers of commerce, community associations, charitable associations and other community based groups, etc. Public announcement of services available on social media platforms, public television and in local newspapers are always opportunities to take advantage of.

Each office or elected member can decide how to engage with citizens and how to allocate resources in support of constituent services. However, developing a reputation for listening to, and then addressing, the needs of constituents will always be mutually beneficial to elected officials, the constituents they serve and the republic we participate in.

Constituents often initiate requests, however government offices can also engage in outreach to promote available assistance and services.

A few important aspects to always keep in mind when addressing constituent issues:

- Do not promise something you cannot deliver.
- Always be mindful and attentive to a constituent reaching out; it is likely that they are reaching out because they have nowhere else to go, but letting them down will only worsen the problem.
- Understand the resources at your disposal and legal restrictions to your position.
- Accurately explaining to constituents what you can do for them without guaranteeing results is helpful in very difficult situations.

Sometimes the most effective option is finding somebody else who can assist in whose jurisdiction the constituent's issues properly reside.

PRACTICAL EXAMPLES OF CONSTITUENT SERVICES

Once elected, you are a public servant. You were elected to do a job. What are your constituents' expectations? You should probably know this before you run for office.

Make sure the needs of the public are being met. Why did they or why should they elect you? Are they happy with your efforts as their elected official? Be diligent and respond to all correspondence unless it is inappropriate. Think of constituents as your best customers. A best practice approach to this is to "meet people where they are at" and having compassion for what is causing them to contact you. Put yourself in their shoes and understand why they are contacting you.

If someone uses profanity or wishes you or your family ill, you do not need to respond. If someone actually threatens you, you might want to get law enforcement involved. They may have threatened others. You can never be too careful when you receive a threat. You should treat it as legitimate unless you discover otherwise. Dealing with an unruly constituent or giving them too much of your time while they are intent on wasting yours only inhibits your ability to serve others. It is important to refer these interactions to the proper authorities.

Make sure that you are a problem solver. If you do not have the answer, find someone who does. If you hand over an issue to someone else, make sure you stay in the loop. You want to be confident that you have a satisfied customer. Calendar the issue to verify that it has been resolved to the satisfaction of the constituent. Always follow-up within a reasonable amount of time.

You may want to set up a formal constituent services protocol for your office or staff. Let your staff know your expectations. You will need a team that you can trust.

Ultimately you are accountable, so make sure that your support staff understands their role and your expectations. Make sure there are checks in place. You want to know right away if constituent needs are not being met. “I did not know or realize” is not an excuse. If you do not take care of your constituents, you are likely to be a one-term public servant.

REFLECTION QUESTIONS

1. What is the main priority of constituent services?
2. Why should you set up a formal constituent services protocol?
3. Why is it important to understand the resources at your disposal and legal restrictions to your position?
4. Why is it important to have a good relationship with your staff?
5. How should you handle unruly constituents?
6. What should you do if you cannot answer a constituent's question?
7. Why is it important to be accountable to your constituents?
8. What is likely to happen if you are not accountable to your constituents?
9. What is the most important tool that constituents have at their disposal to deal with elected officials?
10. Do most constituents understand the power that they have with regard to their elected officials?

ADDITIONAL READINGS

- Governor Gav Gab or the Wayward Californian. Dawn Collier, March 14, 2022.
<https://californiapolicycenter.org/governor-gav-gab-or-the-wayward-californian/>



CLEO Leadership Handbook
Module 9: Janus Rights
Jackson Reese interviewed by Will Swaim

OVERVIEW

In 2018, the United States Supreme Court issued its landmark *Janus* decision, confirming that it is unconstitutional for government employers to deduct union dues or fees from employee paychecks without the employee's permission. In other words, no employee whose workplace is represented by a government union can be forced to pay any part of his or her paycheck to any union as a condition of employment.

Despite this clear ruling, California government unions and the politicians they support have conspired to keep employees and employers in the dark about their new *Janus* rights and obligations. For example, on June 27, 2018, the day of the Supreme Court's *Janus* decision, California enacted union-authored legislation that has been interpreted as a ban on discussing *Janus* rights in the workplace. That, of course, is unconstitutional.

That is why we need your help to inform employees and employers about their *Janus* rights.

A grassroots effort by concerned California residents has filled the void created by the political establishment's silencing of this issue.

Here are some ways you can make *Janus* applicable in your community:

- Post in your workplace, letting all employees know about their *Janus* rights.
- Mail to government employers, informing them of their obligations to receive employees' informed consent before deducting any union dues or fees from their paychecks.
- Mail to employees, informing them of their rights to stop paying any money to the union that represents their workplace.
- Complete the process yourself.
- You can personalize the highlighted sections to reflect the workplaces, employers and employees you are targeting.

By understanding, exercising and promoting these workplace rights, ordinary Californians can successfully challenge the vested interests of public unions and the politicians on their payroll that want to keep Californians in the dark when it comes to our rights to stop paying union dues and fees.

REFLECTION QUESTIONS

1. How does the *Janus* decision affect public union employees?
2. Do any public union employees have to pay union dues as a result of the *Janus* case?
3. Are there other comparable alternatives to paying union dues to get liability and other protections necessary or important for union members, and how does the price of other coverage compare with the cost and benefits offered by the union?
4. What would be a situation where the union would not defend their union paying members?
5. What is the difference in benefits received from the union between union and non-union members?
6. Can a union punish you or remove you from the union for not paying union dues following the *Janus* ruling?
7. Can public employers discuss the *Janus* decision with their employees? If so, what are the parameters?
8. Do you agree with *Janus* rights as outlined in the 2018 U.S. Supreme Court decision? Articulate your reasoning.
9. How do you view unions and their role in the public sector and are they overall beneficial to the common worker?
10. Is it important to know how your local unions operate? Why or why not?

ADDITIONAL READINGS

- The *Janus* Project, California Policy Center. <https://californiapolicycenter.org/janus/>
- A *Janus* Type Reprieve for Taxpayers. Larry Sand, June 12, 2018. <https://californiapolicycenter.org/a-janus-type-reprieve-for-taxpayers/>
- Despite *Janus*, Unions Still Forcing Workers to Pay Annual Dues. Steven Greenhut, November 14, 2018. <https://californiapolicycenter.org/despite-janus-unions-still-forcing-workers-to-pay-annual-dues/>
- The *Janus* Decision and Teacher Freedom One Year Later. Larry Sand, July 2, 2019. <https://californiapolicycenter.org/the-janus-decision-and-teacher-freedom-one-year-later/>

- *Jackson v. Napolitano*. Jackson Reese, July 30, 2019.
<https://californiapolicycenter.org/jackson-v-napolitano/>
- California's Public Sector Unions Rake In \$921 Billion. Edward Ring, August 5, 2020.
<https://californiapolicycenter.org/californias-public-sector-unions-rake-in-921-billion-in-annual-revenue/>
- Inform Employees and Employers about their *Janus* Rights. California Policy Center, August 6, 2020.
<https://californiapolicycenter.org/inform-employees-and-employers-about-their-janus-rights/>



CLEO Leadership Handbook
Module 10: Ministerial Approvals, Licensing & Permitting
Louise Lampara interviewed by Mari Barke

OVERVIEW

Local governments have an obligation to oversee any number of decisions that impact their jurisdictions. Below are three main approval processes with which every local elected official should be familiar.

Ministerial approval does not typically involve discretion, personal judgment or policymaking. It is a routine act or duty that does not require the exercise of wisdom or deliberation. There is often a prescribed procedure or instructions for the ministerial act or approval. There might simply be a checklist used to issue an approval and it can be done by staff rather than an elected or appointed official.

Licenses are usually pretty easy to acquire and only require an application. They provide permission to carry out a certain type of business or activity in your city or county. Most states require businesses in the U.S. to have an active business license. In addition to giving a business credibility and public trust, they are often required in order to sell certain goods or services or perform some business activities. Requirements to get a license will vary depending on your state, type of business and industry, business structure and location. Certain states and counties require much more than others to obtain a license and expiration dates can vary. Local regulations should be considered as well. If your business activities change it may require a new license. If your business has operations in multiple cities or states, you will probably need to apply for multiple licenses. Most business licenses are issued by local, county or state governments. A federal government license is only required for certain regulated activities.

Permits are typically more limited and might require an inspection or additional information to process than a license, and may require discretionary approval from officials who were delegated the required authority by state law or local ordinance. A permit might be requested for a specific event or type of equipment. Permits can serve to provide trust to the public that you will operate your business or special event safely and it will not negatively impact the public health and safety of the community.

It is not unusual for businesses to be required to have a combination of licenses and permits from both state and federal government agencies to operate. Below is a list of different types and examples of business licenses. States also license professionals who work in personal services, such as manicurists, cosmetologists and massage therapists.

BUSINESS LICENSE TABLE

Common Licenses	Federal Licenses	State Licenses
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- | | | |
|---|--|---|
| <ul style="list-style-type: none"> ● General business ● Liquor License ● Doing business as (DBA) license ● Sales permit ● Home occupation permit ● Zoning permit ● Commercial sign permit ● Health permit | <ul style="list-style-type: none"> ● Agriculture ● Alcoholic Beverages ● Aviation ● Firearms, ammunition, and explosives ● Fish and wildlife ● Commercial fisheries ● Maritime transportation ● Mining and drilling ● Nuclear energy ● Radio and television Broadcasting ● Transportation and logistics | <ul style="list-style-type: none"> ● Medicine ● Nursing ● Law ● Dentistry ● Teaching ● Accounting ● Veterinary Medicine ● Pharmacy ● Psychology ● Engineering ● Architecture |
|---|--|---|

REFLECTION QUESTIONS

1. Why does ministerial approval typically just require a checklist to issue an approval and why does a staffer rather than an elected or appointed official usually issue Ministerial Approvals?
2. What are some of the reasons one would want or need to acquire a license?
3. Why do most states require businesses in the U.S. to have an active business license?
4. Requirements to get a license will vary. What are some of the factors that influence these requirements?
5. What type of license will be required if your business activities are regulated?
6. List some of the different types of agencies that issue licenses.
7. Under what situations might you need to apply for multiple licenses?
8. How do licenses and permits differ and do some businesses require a combination of licenses and permits?
9. What are some common types of business licenses and permits?
10. What are some typical businesses that require state and/or federal licenses to operate?

ADDITIONAL READINGS

- Unions Extensively Interfere with California Solar Photovoltaic Power Plant Permitting. Kevin Dayton, July 20, 2013.
<https://californiapolicycenter.org/unions-extensively-interfere-with-california-solar-photovoltaic-power-plant-permitting/>
- Bankruptcy Won't Help Cities Unless Courts Permit Reduced Pension Benefits. Steven Greenhut, August 21, 2012.
<https://californiapolicycenter.org/bankruptcy-wont-help-cities-unless-courts-permit-reduced-pension-benefits/>



CLEO Leadership Handbook
Module 11: Crony Capitalism
David Bahnsen interviewed by Will O'Neill

OVERVIEW

Crony capitalism suppresses open competition and the government is subject to the highest and most corrupt bidders.

In David L. Bahnsen's book, *There's No Free Lunch* (page 135), Dr. Samuel Gregg said, "Crony capitalism is about hollowing-out market economies and replacing them with what may be described as political markets. In political markets, the focus is no longer upon prospering through creating, refining, and offering products and services at competitive prices. Instead, economic success depends upon people's ability to harness government power to stack the economic deck in their favor. While the market's outward form is maintained, its essential workings are supplanted by the struggle to ensure that governments, legislators and regulators favor you at other people's expense. In that sense, crony capitalism certainly constitutes a form of redistribution: away from taxpayers, consumers and businesses focused on creating wealth, and towards the organized, powerful, and politically-connected."

Crony capitalism is very simply defined as when the government is selecting winners and losers. We cannot have special incentives or tax credits for one group and not another. It does not matter what you call them; if you are giving one group an advantage over another it is crony capitalism. Incentives can come in the form of subsidies, mandates, rebates, waivers, loan guarantees and other benefits that are provided disproportionately to one group over another or society as a whole. Taxes and regulations should be lowered for everyone rather than a select group, so avoiding crony capitalism is very simple: low or less taxes and regulations for everyone.

One group should not be favored over another group for any reason. It does not matter if the business is altruistic or important for society! A level playing field is what is best for everyone. Competition will sort out the other issues and lead to creativity and innovation. Crony capitalism actually stifles competition and innovation in many ways.

Local governments should be creative and remove obstacles preventing growth for everyone, not a specific group. No business should have a government-provided advantage over another business.

REFLECTION QUESTIONS

1. Is Crony Capitalism ever good for society? Please explain your answer.
2. How does Crony Capitalism have the effect of picking winners and losers?
3. Explain how Crony Capitalism is considered a form of redistributing wealth.
4. Should altruistic businesses be given more incentives than other businesses? Why or why not?
5. How does Crony Capitalism stifle creativity and innovation?
6. What are some of the types of incentives that Crony Capitalism includes and what are some of the negative effects, especially for small businesses?
7. What are some alternatives to Crony Capitalism?
8. What would be some of the benefits of lower taxes and regulations rather than Crony Capitalism?
9. Should a business ever have a government-provided advantage over another business? If so, when?
10. Think of an example that you would consider Crony Capitalism. Why do you consider this example Crony Capitalism?

ADDITIONAL READINGS

- “Crisis of Responsibility” by David L. Bahnsen was used as a resource for much of the information in this module. “There’s No Free Lunch” is another book by David Bahnsen that opines on important financial topics.
- The Alternative to Crony Capitalism and Phony Shortages. Edward Ring, June 15, 2016.
<https://californiapolicycenter.org/crony-capitalism-phony-shortages-and-nanny-robots/>
- Crony Capitalism – California Style. Jon Coupal, March 10, 2014.
<https://californiapolicycenter.org/crony-capitalism-california-style/>
- Crony Capitalism vs. Public Pension. Andrew Biggs, February 10, 2014.
<https://californiapolicycenter.org/crony-capitalism-vs-public-pensions/>
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CLEO Leadership Handbook
**Module 12: Municipal Financing, Principles of Taxes, Fees,
Bonds & Liabilities**
John Moorlach interviewed by Will Swaim

OVERVIEW

It is important for elected officials and candidates to understand municipal financing, taxes, fees and bonds, and the effects they can have on your governmental budget.

Municipal finance involves the revenue and expenditure decisions of municipal governments. It includes various sources of revenue including taxes (property, income, sales, excise) and non-tax revenues as well as necessary expenses. Revenue and expenses of any government entity must be carefully considered and reviewed to ensure the long-term sustainability of local government services provided to constituents and basic infrastructure.

In order to participate in municipal finance for your government entity, you should have a basic understanding of a budget, including how to read audited financial statements. The rising cost of salaries, benefits, and retirement plans cannot be overlooked and are often one of the largest liabilities of any government budget.

Cities and counties will often have to make hard decisions to cut programs, services and staffing in order to provide essential services. Renegotiating contracts is another option to keep fiscally solvent.

There are many resources and agencies that can assist with reviewing municipal finance such as Truth in Accounting. You can also contract with finance experts to review and audit expenditures versus revenues.

You may need to find ways to expand revenues to cover expenses. It is always best to try and raise revenues without incurring more debt and financial obligations.

Tax sharing between city and county is also important and critical to the relationship between the revenue that the city and the county receive. Municipalities generally have control over raising revenue and expenditures. Taxes can be challenging to negotiate.

Adam Smith suggested four principles for taxation decisions. Are they:

1. Certain
2. Fair
3. Convenient
4. Efficient?

As a public official, efficiently and responsibly using taxpayer money will be one of your most important tasks. It is important to know the finances of your government entity and the entities/municipalities around you. That includes the approval and issuance of municipal bonds, a borrowing instrument to raise funds for a specified reason. For example, a county that needs funding for roads may turn to a measure or a bond to be voted on by the citizens to fund these roads. Or a municipality may think that they can better manage pension costs with short and long-term bonds. Beware of borrowing money to pay for other soft obligations.

To check the “fiscal health” of cities, the State Auditor allows for the search of any city in California here: https://www.auditor.ca.gov/local_high_risk/dashboard-csa.

By knowing the fiscal health of your city and those around a particular jurisdiction, the official may be able to anticipate tax sharing negotiations and future taxes that may be advanced by staff.

Tax sharing between municipalities is another issue to consider. If you are a city official, you might be tasked to negotiate tax-sharing agreements with other entities, such as the county in which your city resides. Understanding the tax splits now for property and sales tax will benefit you at the negotiation table.

REFLECTION QUESTIONS

1. What does municipal finance involve?
2. What are different sources of revenues?
3. Name some different types of expenses?
4. What are the largest liabilities of most government budgets?
5. Why is it important to have government sustainability?
6. What are some options to keep a municipality fiscally solvent?
7. Name a few resources to assist in reviewing municipal finances?
8. Describe some creative ways to raise revenues?
9. What should you avoid when trying to balance your municipal budget?
10. When might a city have to make hard decisions to cut programs, services, or staffing?

ADDITIONAL READINGS

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- It's Time for Your Community to Create a Municipal Audit. Edward Ring, August 14, 2017. <https://californiapolicycenter.org/time-community-create-municipal-audit/>
- Local and State Initiatives – The Future of Policy in California? Edward Ring, September 18, 2019.
<https://californiapolicycenter.org/local-and-state-initiatives-the-future-of-policy-in-california/>
- Fighting the One Party State at the Local Level in California. Edward Ring, February 12, 2020.
<https://californiapolicycenter.org/fighting-the-one-party-state-at-the-local-level-in-california/>
- Environmentalists Increase Influence on Local Governments. Edward Ring, January 20, 2021.
<https://californiapolicycenter.org/environmentalists-increase-influence-on-local-governments/>



CLEO Leadership Handbook
**Module 13: Infrastructure, Housing, Public Works,
 & Property Rights**
Peggy Huang interviewed by Will Swaim

OVERVIEW

Elected officials deal with many complex issues like with infrastructure, housing and public works, and are expected to protect property rights and local control. As an elected official, protecting property rights and improving infrastructure will be one of the most important and critical things with which you will be entrusted.

If you are unsure about where to start, begin with becoming familiar with your Public Works Department and your Planning Commission.

With your Public Works Department, find time to meet with your public works director and their employees. Ask for monthly infrastructure updates and be sure to know what projects are on the docket moving forward.

It is important to understand the cost of infrastructure and opportunities for grants to fund projects instead of using general fund dollars. General funds can then be directed toward maintenance, repair, and renovation of new and existing infrastructure. Infrastructure investment should not be a partisan issue.

Public officials should make themselves aware of grant funding. SCAG and environmental groups have grant programs that can offset cost. A public official should seek those opportunities for his city at all times.

It is important for public officials to know the cost of a project, so they will not make unreasonable demands or adjustments to the budget to save money, and then later it will cost more to fix that miscalculation. For example, the cost of a 50 foot 18' in diameter concrete sewage cost is fixed. You cannot get it cheaper. So, asking staff to reduce the cost of a project is unreasonable because the only place to cut is wages or worse, materials used which often will cause other issues.

For most communities, road and sidewalk infrastructure will be a top priority. Make sure that you are directing the Public Works Department to continuously be progressing in this area.

With your Planning Commission, attend Planning Commission Meetings and meet with your Planning Commissioners regularly. Many municipalities and entities appoint or elect their Planning Commissioners. In many cases the previous board or your predecessor will have appointed the Planning Commissioner for your district. Make

sure that you are both on the same page and have an understanding of individual property rights.

If you are given the opportunity to participate in a process to nominate or appoint a Planning Commissioner, prioritize those that understand the community and individual property rights. These two aspects are critical in being an effective Planning Commissioner.

It is imperative that you stay up to date with state regulations and laws regarding housing. For example, many municipalities will be adapting to Senate Bill 9 (Atkins, 2021) which facilitates the process for homeowners to subdivide their current residential lot or build a duplex. This will cause new housing applications to increase dramatically!

REFLECTION QUESTIONS

1. As an elected official, how should you approach an issue regarding public infrastructure?
2. If worried about a public works issue, who should you direct your attention to?
3. What can you do to understand the infrastructure needs of your community better?
4. As an elected official, what can you do to protect personal property rights?
5. How does the state influence housing policy on a local level?
6. How would you approach a contested property issue, such as eminent domain?
7. Does your community have a housing shortage? If so, what policies could be implemented to help curb this shortage?
8. What is the number one infrastructure need in your community?
9. How would you approach a differing opinion between your Planning Commission recommendation and your Public Works staff?
10. What is the number one priority of the Public Works Director?

ADDITIONAL READINGS

- California's Homeless Housing Scam. Edward Ring, February 11, 2022.
<https://californiapolicycenter.org/californias-homeless-housing-scam/>
- Fixing California—Part Five: Affordable Market Housing. Edward Ring, July 14, 2021.
<https://californiapolicycenter.org/fixing-california-part-five-affordable-market-housing/>
- The Key to Affordable Housing? More Suburbs. Edward Ring, April 26, 2021.
<https://californiapolicycenter.org/the-key-to-affordable-housing-more-suburbs/>
- The Manager vs. the Monster — Housing California's Homeless. Edward Ring, December 18, 2019.
<https://californiapolicycenter.org/the-manger-vs-the-monster-housing-californias-homeless/>
- Key Policy Issues Affecting the California Housing Crisis. Chad Lonski, May 29, 2019.
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CLEO Leadership Handbook
Module 14: Public Safety
Don Barnes interviewed by Will Swaim

OVERVIEW

Some considerations for public safety are: can public officials support law enforcement, rein in costs to taxpayers, and respond legitimately to concerns about police violence? Is there a problem with public safety, including on school campuses? Is police violence an issue? How can we push back against “defunding the police” resolutions?

Public Safety is the single most important thing to consider for any city or county. Without confidence in public safety, citizens will not feel comfortable. Nothing else matters if people do not feel safe where they live, work and play. Community members may take public safety for granted but elected officials and law-enforcement must make this a top priority in order for their city, county or other government entity to run effectively. Whatever your role is as an elected official, you must always put public safety first.

People will not attend community events and meetings if they do not feel safe. Of course, public safety is a bigger issue in certain parts of the city, county or state, but it must always be considered a priority even down to the smallest meeting or event. If citizens do not feel safe, a government entity cannot function properly.

Depending on whether your jurisdiction is incorporated or unincorporated might determine what local law enforcement agency you will depend on for public safety. You might use the local police department or the county sheriff’s department if your district is unincorporated. There can also be overlap. A county government entity can contract with the county sheriff’s department or the local police agency where the meeting is held. An outside security company can also be hired for a specific event or series of meetings or events. Independent security companies’ training will typically differ from city or county law enforcement agencies. Comparing the needs of your city, county or other government entity versus the cost of various law enforcement agencies will be important to keep your citizens safe and your costs within your government entity’s budget.

Different law enforcement agencies offer different services. An example is the Orange County Board of Education whose meetings take place in the city of Costa Mesa. The Board found that the Orange County Sheriff’s Department has the most extensive training, therefore they were chosen over the Costa Mesa Police Department. Price

should factor into your decisions, but public safety must be a top priority for all meetings.

The fire department also falls under public safety. Depending on your city, there may be opportunities for improving or reducing the cost of local fire protection to improve your cities fiscal sustainability.

Public safety is the most important and critical task that city governments face.

The idea of public safety underlies numerous public policy decisions and laws, as well as many of the choices that each of us make in our everyday lives. But, what is it? What comes to mind when you hear the phrase “public safety”?

Legal scholars define public safety as “the protection of the general public,” and they reference groups like police officers and firefighters as Public Safety Officers. Many governments form their policies on this idea of protecting people’s physical welfare. They often focus on combating crime in an effort to help community members feel secure, and they hire for roles like law enforcement officers and medical emergency responders. (Source: “Reimagining Public Safety Blog, What is Public Safety?”, 3/24/2021, austintexas.gov)

According to Senate Bill 978, effective January 1, 2020, all local law enforcement agencies are required to “conspicuously post on their Internet Web sites all current standards, policies, practices, operation procedures, and education and training materials that would otherwise be available to the public if a request was made pursuant the California Public Records Act.”

REFLECTION QUESTIONS

1. Why would public safety be an important thing to consider for any government entity?
2. As an elected official should you always put public safety first? Please explain why.
3. What are some of the law enforcement options when selecting an agency to provide public safety or security services?
4. What should you consider when picking a law enforcement agency among the alternatives available?
5. Why is it important for your government entity to have a mission statement regarding public safety?

6. Your local Fire Authority also falls under public safety. What are some options for the city with regard to providing safety from fire?
7. What should you consider when choosing a local fire protection service?
8. What are some of the options to improve your city's fiscal sustainability with regard to public safety?
9. What are the pros and cons of electing a sheriff or other public safety officer?
10. What can local elected officials do to improve public safety and constituent perceptions of public safety?

ADDITIONAL READINGS

- Public Safety Compensation and Public Safety. Edward Ring, February 26, 2020.
<https://californiapolicycenter.org/public-safety-compensation-and-public-safety/>
- What Do Public Safety Unions Stand For? Edward Ring, June 13, 2019.
<https://californiapolicycenter.org/what-do-public-safety-unions-stand-for/>
- Why Are Public Safety Unions Supporting Teachers Unions? Edward Ring, May 15, 2019.
<https://californiapolicycenter.org/why-are-public-safety-unions-supporting-teachers-unions/>
- City of San Jose's Capitulation to Public Safety Unions is Complete. Edward Ring, April 19, 2016.
<https://californiapolicycenter.org/city-of-san-joses-capitulation-to-public-safety-unions-is-complete>



OVERVIEW

There are many academic as well as nonacademic reasons that parents should be able to choose different schooling options for their children. Lance Izumi's book *The Corrupt Classrooms* has five chapters that lay out the case for why parents need school choice:

- 1) Political and Ideological Bias in the Classroom
- 2) Unsafe Environments
- 3) Fiscal Mismanagement
- 4) Sexualization of the Classroom
- 5) Religious Bias

It is the obvious corruption in America's classrooms that is the most convincing argument for freedom of choice in education.

Charter schools were established in 1992 and are a free public option to traditional public schools. Lance Izumi discusses that the "wide diversity of learning models" is what really sets charter schools apart from traditional public schools. The California Charter School Association's definition of charter schools talks about "unique educational experiences." Charter schools are free independent schools that have some freedom and flexibility with regard to day-to-day operations, but as a result are subject to higher standards of accountability. Students have different needs when it comes to learning. Charter schools offer a free alternative to help meet the different needs of individual students.

Charter schools not only have more flexibility than traditional schools but also have a huge diversity of missions, goals, and curriculum and educational opportunities. Some examples of different types of charter schools include: High Tech, STEM, Science, Classical, Theater and Arts, and schools that focus on dual language or language immersion.

Parents need to have educational choices for their children. One form of school choice that is becoming increasingly popular is homeschooling. There are an infinite number of reasons why so many parents choose to homeschool their children. A few of the reasons include: flexibility, curriculum, safety, dealing with some of the issues and services needed for special needs children, and learning results or learning loss.

Homeschooling allows for the ultimate choice when facing various educational challenges. The tremendous resources that are available combined with the freedom to address individual needs and concerns with regard to education — as well as family values — make homeschooling a great alternative for many families.

There is a lot of misinformation about homeschooling. Many criticize the lack of “socialization,” which can easily be addressed through creative learning opportunities with organizations and other homeschooling students. The growth of homeschooling has blown up as a result of the pandemic! It is expected to continue to increase as a result of advances in technology and resources available to parents. More parents working remotely allows more families the flexibility to homeschool their children as well. There are also increasing options for socialization in conjunction with homeschooling.

REFLECTION QUESTIONS

1. Who is ultimately responsible for the education of children?
2. What does Article IX of the California Constitution mean when it states that “the Legislature shall provide for a system of common schools by which a free school shall be kept up and supported in each district at least six months in every year”?
3. Why would parents want to choose schools different from those they are assigned to in their neighborhood?
4. What are parents’ options for choosing schools for their children?
5. What kind of public schools exist?
6. How does homeschooling work in California?
7. What reforms could California make to provide for a high-quality public education?
8. What are some of the reasons parents choose private schools over public schools?
9. What is an interdistrict transfer and what are the options for a family if the transfer is denied?
10. What unique role does the County Board of Education play with regard to charter schools and interdistrict transfers?

ADDITIONAL READINGS

- *The Corrupt Classroom: Bias, Indoctrination, Violence, and Social Engineering Show Why America Needs School Choice.* Lance Izumi with Cassiday Syftestad and Christie Syftestad
- *Choosing Diversity: How Charter Schools Promote Diverse Learning Models and Meet the Diverse Needs of Parents and Children.* Lance Izumi
- *The Homeschool Boom: Pandemic, Policies, and Possibilities, Why Parents Are Choosing to Homeschool Their Children.* Lance Izumi
- Student Centered Funding, School Choice and Racism. Larry Sand, September 21, 2021.
<https://californiapolicycenter.org/student-centered-funding-school-choice-and-racism/>
- Unmasking School Choice. Larry Sand, August 17, 2021.
<https://californiapolicycenter.org/unmasking-school-choice/>
- Newsletter: A New Day For School Choice in California. Jackson Reese, June 12, 2021.
<https://californiapolicycenter.org/newsletter-a-new-day-for-school-choice-in-california/>
- Fighting, and Winning, School Choice in California, Edward Ring. March 25, 2021.
<https://californiapolicycenter.org/fighting-winning-school-choice-california/>
- School Choice Initiative Quietly Gathers Support. Edward Ring. January 27, 2021.
<https://californiapolicycenter.org/school-choice-initiative-quietly-gathers-support/>



CLEO Leadership Handbook Exit Interview

Now that you have completed this course, you may schedule a short phone exit interview with the CLEO director via the certificate request button on the Leadership Academy course website to receive your certificate of completion. This credential from California Policy Center confirms your completion of the course which you can place on your resume, social media profiles (i.e. LinkedIn) or other personal biographies.

Below are some prompts to consider for your exit interview.

What was the most surprising thing you learned?

Which issues are most important or essential to your role?

How can you better focus on your top priorities as an elected official?

What did you change your mind on if anything?

How will you share this information with your colleagues and constituents?

ABOUT THE CONTRIBUTORS

California Policy Center Staff

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Leadership Academy Experts (in order of appearance)

Ryan Williams is President of the Claremont Institute and publisher of the Claremont Review of Books and The American Mind. He has taught American politics and political philosophy as an adjunct professor at California State University, San Bernardino and Cal Poly Pomona.

Will O'Neill is an attorney and small businessman currently serving his second term on the Newport Beach City Council. In 2020, he served as the Mayor of Newport Beach.

Jim Righeimer served on Costa Mesa's City Council for eight years, two of them (2012-2014) as Mayor. He is currently the CEO of Arbor Capital Partners, LLC.

Greg Rolen is an attorney and Managing Partner of Haight Brown & Bonesteel LLP's San Francisco office and is the Chair of the Public Sector practice group. He has over 30 years of legal experience and represents a variety of public school districts, charter schools, county offices, administrators, joint powers and authorities, and 501(c)(3) organizations throughout California.

Mark Moses has thirty years of experience in local government administration and finance. He has consulted California municipal governments in the areas of finance and administration since 2011. Prior, he spent two decades working directly for local government in senior management positions.

Kevin Kiley was first elected to the California Assembly in 2016 serving three terms there. In 2022, he was elected to the U.S. Congress, representing California's 3rd Congressional District. In addition to being a former teacher, he has served as a Deputy Attorney General for the state.

Louise Lampara is the Executive Director at Ventura County Coalition of Labor, Agriculture, and Business (CoLAB), a non-profit regulatory watchdog and business advocacy organization. She has over 18 years of experience in environmental permitting, regulatory compliance and reducing environmental risk, as well as strong knowledge of federal, state and local environmental regulations.

David Bahnsen is the founder, Managing Partner and Chief Investment Officer of The Bahnsen Group. Prior to launching The Bahnsen Group, he spent eight years as a Managing Director at Morgan Stanley and six years as a Vice President at UBS Financial Services. He is consistently named as one of the top financial advisors in America by Barron's, Forbes and the Financial Times (2016-2021). He serves on the board of directors of California Policy Center.

John Moorlach began his public career in 1994, when as a licensed Certified Public Accountant and Certified Financial Planner, he warned that Orange County's highly-leveraged investment strategies would lead to fiscal disaster. After his warnings proved true, he was elected to serve as Treasurer and Supervisor of Orange County. He was a California state Senator from 2015 to 2020.

Peggy Huang is an experienced courtroom prosecutor, child safety advocate and community volunteer. She has served her community in multiple capacities, including as Chair of the Foothill/Easter Transportation Corridor Agency, Yorba Linda City Councilwoman, and Deputy California State Attorney General. She ran for judge of the Superior Court of Orange County in 2022.

Don Barnes has over thirty years of law enforcement service to the people of Orange County. He joined the Orange County Sheriff's Department in 1989. Over the course of his career with the department, he has held every leadership rank, culminating with his election as the 13th Sheriff-Coroner for Orange County in November 2018.

Lance Izumi is Senior Director of the Center for Education at the Pacific Research Institute. He is the author of *The Homeschool Boom*, and has written and produced books, studies and films on a wide variety of education topics over the course of his distinguished career. He has served on the Board of Governors of the California Community Colleges and the U.S. Civil Rights Commission's California Advisory Committee.

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