



California Ethics Project

CALIFORNIA ETHICS SUMMIT

Thursday, July 30, 2009

7:30 AM – 5:00 PM

Santa Clara City Council Chambers

1500 Warburton Avenue

Santa Clara, CA 95050

(408) 615-2220

- **GOAL:** The goal of the California Ethics Summit is to provide a venue for sharing resources, examples and teaching the skills necessary to implement ethics, good government and community outreach projects. To develop implementation strategies, expectations and examples of programs, best practices, education curriculums, identify shared resources and foster a peer group for the implementation of these efforts.

- **CURRICULUM:**

- **8:00 – 10:45: Why and What**

Explore the moral and practical reasons for ethics and community outreach programs. Examples of and strategies surrounding the creation and implementation of the “foundation elements” in codes of ethics and campaign finance reform as well as the “enforcement elements” in ethics commissions as well as large and small budget community outreach efforts. Group exercise discussing programs and brainstorming free and paid mediums in individual communities:

8:10 – 8:50: Codes of Ethics and Campaign Finance Reform, *Dr. Tom Shanks*

8:50 – 9:10: Ethics Commissions, *Dan Purnell, Executive Director of the Oakland Ethics Commission*

9:10 – 9:25: Small Budget Program, *Susan Kitchens, CMC, Los Altos Voter Outreach Program*

9:25 – 9:40: Medium Budget Program, *Kryss Rankin, CMC, West Sacramento Voter Outreach Program*

9:40 – 9:55: Large Budget Program, *Rod Diridon, Jr., CMC, Santa Clara Vote Ethics Program*

9:55 – 10:45: Group Exercise – A discussion of the different types of programs and brainstorming regarding the free and paid mediums available in each community and how to use those most effectively.

- **10:45 – 11:00: Break**

- **11:00 – 12:00: An Insider’s View on Political Campaigns**

Understanding political candidates, how they operate at their best and at their worst. Effective strategies to allow the public to research candidates’ ideologies, fundraising, history and other information.

11:00 – 11:30: An Insider’s View on Political Campaigns, *Rich Robinson, Robinson Communication*

11:30 – 12:00: Panel: Politics at Its Best, and Worst, *Rich Robinson and Tom Shanks*

- **12:00 – 12:30: Lunch**

Break and service for working lunch.

- **12:30 – 3:00: Messaging and Mediums**

How to formulate the messaging surrounding an outreach campaign and compose appropriate collateral material. Group exercise brainstorming names of programs, main messages for use and composing a piece of collateral material.

12:30 – 1:30: A Perfect Message is Perfectly Clear: *Leo Briones, Centaur North Strategic Communications*

1:30 – 3:00: Group Exercise – How to compose a compelling piece of collateral material.

- **3:00 – 3:15: Break**

- **3:15 – 4:30: Managing the Logistics and What Could Go Wrong**

A review of the partners, moving pieces and logistics necessary to implement these programs. Also identifying the pitfalls to avoid and how to manage around them.

3:15 – 3:45: Managing the Logistics – A Method to the Madness, *Carol McCarthy, Deputy City Manager, Co-Lead Santa Clara Vote Ethics Program*

3:45 – 4:30: Panel: When You Walk Through a Storm – Lessons From the Field, *Carol McCarthy, Tom Shanks, Marcia Torgerson, CMC*

- **4:30 – 5:00: Outcomes and Action Items**

Group exercise regarding the outcomes, action items and assessment of the program.

CALIFORNIA ETHICS SUMMIT BIOGRAPHIES OF PRESENTERS

Leo Briones: Centaur North Communication Strategies President Leo Briones is an experienced political and public affairs strategist. He has successfully guided candidates to the US Congress, California State Senate and State Assembly. A former broadcast journalist and middle school teacher, he is highly regarded for his ability to bring innovative and creative solutions to solve serious communication challenges.

Rod Diridon, Jr., CMC: Rod Diridon, Jr. is the City Clerk and Auditor for the City of Santa Clara. A former City Councilmember, he was a founding member of the City's campaign finance reform and ethics committees, Chairing the effort to create the City's first Campaign Finance Reform Act. Mr. Diridon is the Co-Lead for the City's award-winning Vote Ethics Program and the Chair of the California Ethics Project.

Susan Kitchens, CMC: Susan Kitchens has worked in the City Clerk profession for more than 23 years. Serving as a City Clerk in small and large cities both in and outside of California, she brings a unique perspective to the profession. Currently she serves as the council-appointed City Clerk for the City of Los Altos. She is also in charge of the City's newsletter and the lead for the award-winning City of Los Altos Voter Outreach Program.

Carol McCarthy: Deputy City Manager Carol McCarthy has worked for the City of Santa Clara since 1987. Prior to her tenure with the City, she was the Director of Development for the Crippled Children's Society in Santa Clara County. A department head, Ms. McCarthy is responsible for the City's many media and community relations efforts including the website, cable channel and City newspaper. She is also the Co-Lead for the City's award-winning Vote Ethics Program.

Dan Purnell: Daniel Purnell was hired as the Executive Director to the Oakland Public Ethics Commission in April, 2000. He is a former civil litigation attorney with a background in employment, contract, land use and environmental law. Prior to joining the California Bar, Mr. Purnell served as manager of media relations for Pacific Telesis Group and Bechtel Group, Inc. Mr. Purnell is one of the recognized experts in the field of ethics commissions in the State of California.

Kryss Rankin, CMC: Kryss Rankin has worked in local government for more than 21 years. She has served as a Deputy City Clerk, Refuse and Recycling Program Administrator, Executive Assistant to the City Manager and has been the City Clerk for the City of West Sacramento for the past 4 years. Most recently, Kryss pioneered a unique partnership with the League of Women Voters as the project lead for the City of West Sacramento Voter Outreach Program.

Rich Robinson: Rich Robinson is a professional political consultant, attorney and President of Robinson Communications Inc. He has worked in a myriad of roles on more than 50 political campaigns, ranging from Presidential races to local city council and school board efforts. Mr. Robinson has also served in an administrative capacity for the US Senate and for the California Department of Insurance.

Dr. Tom Shanks: Dr. Tom Shanks is one of the pioneers and leaders in the study and implementation of ethics programs in the State of California. The former Director of the Markulla Center for Applied Ethics at Santa Clara University, Dr. Shanks is currently the President of The Ethics Company working with communities across the state regarding the topic of ethics.

Marcia Torgerson, CMC: City Clerk Marcia Torgerson has worked in local government for more than 12 years. Prior to her tenure in government service, she spent 27 years in the private sector as a manager and later the owner and operator of McClure Business Service. Marcia is the program lead for the City of Atascadero's comprehensive ethics and voter outreach Building Public Trust Program.