



# CITY OF COSTA MESA

77 Fair Drive  
Costa Mesa, CA 92626

## Agenda Report

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**File #:** 26-151

**Meeting Date:** 2/17/2026

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**TITLE:**

**TRAINING REQUIREMENTS FOR ELECTED AND APPOINTED OFFICIALS**

**DEPARTMENT:** CITY ATTORNEY

**PRESENTED BY:** KIMBERLY HALL BARLOW, CITY ATTORNEY

**CONTACT INFORMATION:** KIMBERLY HALL BARLOW, CITY ATTORNEY (714) 446-1400

**RECOMMENDATION:**

Receive and File a report on updated Training Requirements for Elected and Appointed Officials.

**BACKGROUND:**

Commencing in 2005, State law has required that local elected and appointed officials who are members of legislative bodies receive ethics training covering laws relating to personal financial gain, perquisites of office, government transparency laws, and laws relating to fair processes. Effective January 1, 2026, this requirement has been extended to Department Heads and other designated officials, by passage of SB 827. The time period for initial training after assuming office has been shortened, and new website posting requirements were implemented as well.

In addition to the changes to the ethics training requirements, SB 827 requires new training for local officials on fiscal and financial administration, with existing local officials to be trained by January 1, 2028, and those assuming office on or after January 1, 2026 to be trained within six months of assuming office.

In addition to these training requirements, since 2005, employers with more than fifty employees have been required to provide sexual harassment prevention training to all supervisors and employees pursuant to AB 1825. In 2019, SB 1343 revised this requirement to apply to all employers with five or more employees. The training requirement is at least one hour for employees, and two hours for supervisory employees.

**ANALYSIS:**

Senate Bill 827, effective January 1, 2026, revises the requirements of AB 1234 to expand existing ethics training requirements to department heads and other officials designated by the City Council to receive that training.

The ethics training requirement covers:

- (1) Laws relating to personal financial gain by public servants, including, but not limited to, laws prohibiting bribery and conflict-of-interest laws.
- (2) Laws relating to claiming perquisites of office, including, but not limited to, gift and travel restrictions, prohibitions against the use of public resources for personal or political purposes, prohibitions against gifts of public funds, mass mailing restrictions, and prohibitions against acceptance of free or discounted transportation by transportation companies.
- (3) Government transparency laws, including, but not limited to, financial interest disclosure requirements and open government laws.
- (4) Laws relating to fair processes, including, but not limited to, common law bias prohibitions, due process requirements, incompatible offices, competitive bidding requirements for public contracts, and disqualification from participating in decisions affecting family members.

Government Code section 53234.

Anyone serving as a local agency official before January 1, 2026 must have initial ethics training within one year of assuming office, and every two years thereafter. Those who commence service with the City on or after January 1, 2026, shall receive the required training no later than six months from the first day of service, and every two years thereafter.

The City must maintain records of compliance with this training requirement for at least five years. In addition, commencing July 1, 2026, the City must post on its website clear instructions and contact information for the purpose of requesting such records.

Senate Bill 827 also adds an entirely new requirement for training of local officials on fiscal and financial administration, including laws and principles relating to financial administration and management, financial policies, municipal budgets and budget processes, and financial reporting and auditing; laws and principles relating to capital financing and debt management, agency revenues, pensions and other postemployment benefits, cash management and investments, the prudent investor standard, and the ethics of safeguarding public resources; and general fiscal and financial planning principles and laws relevant to official's role in overseeing the local agency's operations and procurement and contracting practices and responsibilities. The requirement applies to all elected officials, executive officers (including department heads) and all appointees who "as part of their official duties, makes decisions or recommendations regarding financial administration, budgeting, or the use of public resources." Government Code section 53238.

Existing local officials must take this fiscal and financial training by January 1, 2028 unless they will no longer be in office as of that date. Individuals assuming office on or after January 1, 2026 must complete the training within six months of assuming office. After initial training, each affected official must take the training at least once every two years. The law exempts certain financial professionals in good standing from its requirements.

As with the proof of compliance with ethics training, the City must maintain records of compliance with the finance training requirements for at least five years and provide information on its website as to how to obtain copies of these records.

The City Attorney's Office and the Finance Department will collaborate on developing training specific to the financial rules, processes and procedures applicable to the City of Costa Mesa. The complete text of SB 827 is included in Attachment 1.

Finally, all elected and appointed officials who oversee or provide direction to staff are required to receive two hours of sexual harassment prevention training which is required to cover: information and practical guidance regarding the federal and state statutory provisions prohibiting and the prevention and correction of sexual harassment, the remedies available to victims of sexual harassment in employment, practical examples aimed at instructing supervisors in the prevention of harassment, discrimination, and retaliation, prevention of abusive conduct in the workplace, and prevention of harassment based on gender identity, gender expression, and sexual orientation. This training must be repeated at least every two years. Non-supervisory employees are also required to receive at least one hour of sexual harassment training every two years. The complete text of SB 1343 is included in Attachment 2.

The City Attorney's Office works with the City Clerk and the Human Resources Division on ensuring compliance of mandatory trainings. In addition, the League of California Cities offers ethics training at its annual conference. Sexual harassment prevention training is also available on the Department of Fair Employment and Housing website at <https://calcivilrights.ca.gov/shpt/>.

The City Attorney will collaborate with the City Clerk to implement the new retention and posting requirements and to bring forward for future City Council consideration a list of designated officials and employees required to obtain the new fiscal and financial administration training.

**ALTERNATIVES:**

The City Council is requested to receive and file this report. The City Council could give alternative direction to the City Attorney or staff.

**FISCAL REVIEW:**

The costs associated with the training is available in the Adopted FY 2025-26 General Fund (Fund 101) operating budget.

**LEGAL REVIEW:**

The City Attorney's Office prepared this report.

**CITY COUNCIL GOALS AND PRIORITIES:**

This item is administrative in nature, but supports the City's core values of safety, inclusivity, fiscal sustainability, and transparency in government.

**CONCLUSION:**

The City Council is requested to receive a presentation on the updated training requirements for elected and appointed officials and to receive and file this report.