



# City of San Marcos

## Regular Meeting Agenda

### Ethics Review Commission

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Tuesday, October 11, 2022

5:30 PM

City Hall Conference Room

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630 E. Hopkins

This will be a hybrid (in-person/virtual) meeting.

To view the meeting, please go to: <https://us02web.zoom.us/j/89489299142> or

Dial in at: 888 788 0099 (toll free) or 877 853 5247 (toll free) or

One tap mobile: US: +13462487799,,85198572644#,,,,\*147180#

Meeting ID: 894 8929 9142 Passcode: 147180

I. Call To Order

II. Roll Call

III. 30 Minute Citizen Comment Period

*Persons wishing to participate (speak) during the Citizen Comment portion of the meeting must email [mlacey@sanmarcostx.gov](mailto:mlacey@sanmarcostx.gov) no later than 12:00 p.m. on the day of the meeting. A call-in number to join by phone or link will be provided for participation on a mobile device, laptop or desktop computer, if needed. Comments shall have a time limit of three (3) minutes each. Any threatening, defamatory or other similar comments are prohibited by Chapter 2 of the San Marcos City Code.*

1. Consider approval, by motion, of the August 9, 2022 regular meeting minutes.

2. Review, discuss, and take action, as appropriate, on Ethics Review Commission recommendations to City Council.

3. Review, discuss, and take action, as appropriate, on 2021 Annual Financial Disclosure Forms from Council and Planning & Zoning Commissioners.

4. Review, discuss, and take action, as appropriate, on amendment suggestions made by the City Council.

IV. Discussion and Recommendations for Future Agenda Items

*Board Members may provide requests for discussion items for future agenda in accordance with the board's approved bylaws. No further discussion will be held related to topics proposed until they are posted on a future agenda in accordance with the Texas Open Meetings Act.*

V. Question and Answer Session with Press and Public

*This is an opportunity for the Press and Public to ask questions related to items on this agenda. Each speaker will be provided up to three (3) minutes to speak.*

VI. Adjournment

#### Notice of Assistance at the Public Meetings

The City of San Marcos is committed to compliance with the Americans with Disabilities Act. Reasonable modifications and equal access to communications will be provided upon request. If requiring Sign Language Interpreters or alternative formats, please give notice at least 2 days (48 hours) before the meeting date. Individuals who require auxiliary aids and services for this meeting should contact the City of San Marcos ADA Coordinator at 512-393-8000 (voice) or call Texas Relay Service (TRS) by dialing 7-1-1. Requests can also be faxed to 855.461.6674 or sent by e-mail to [ADArequest@sanmarcostx.gov](mailto:ADArequest@sanmarcostx.gov).

For more information on the Ethics Review Commission, contact Monika Lacey at 512.393.8151 or [mlacey@sanmarcostx.gov](mailto:mlacey@sanmarcostx.gov).



# City of San Marcos

## Meeting Minutes

### Ethics Review Commission

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Tuesday, August 9, 2022

5:30 PM

City Hall Conference Room

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#### I. Call To Order

With a quorum present, the regular meeting of the Ethics Review Commission was called to order by Chair Lollar at 5:34 p.m. on Tuesday, August 9, 2022.

#### II. Roll Call

**Present:** 5 - Chair Lollar, Commissioner Garcia, Commissioner Rios, Commissioner Teehan (virtual), and Commissioner Rowe

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

#### III. 30 Minute Citizen Comment Period

There were no speakers.

##### 1. Consider approval, by motion, of the June 14, 2022 regular meeting minutes.

**A motion was made by Commissioner Rios, seconded by Commissioner Garcia, to approve the minutes. The motion carried by the following vote:**

**For:** 5 - Chair Lollar, Commissioner Garcia, Commissioner Rios, Commissioner Rowe, and Commissioner Teehan

**Against:** 0

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

##### 2. Review, discuss, and take action, as appropriate, on Ethics Review Commission recommendations to City Council.

These items were discussed and no action taken. However, there was a consensus of the Commission that these changes would take place in the future. The City council gave direction at its meeting on July 5, 2022 for the city attorney to prepare an ordinance amendment that formalizes the ERC's responsibility to review Annual Financial Disclosure Forms, and requires the ERC to state reasons for its requests to City officials to clarify or correct their forms. The ERC also suggested that the ordinance amendment include a deadline for city officials to clarify or correct their disclosure forms after being notified by the ERC to do so. Mayor Hughson also suggested that the ordinance amendment address ERC review of campaign finance forms to determine compliance with the contribution limits set forth in the Code of Ethics. Also discussed was the recent decision by a majority of the city council not to move forward with adoption of a lobbying ordinance.

3. Review, discuss, and take action, as appropriate, on amended 2021 Annual Financial Disclosure Forms from Council and Planning and Zoning Commissioners.

NOTE: Items 3 and 4 were a combined discussion.

4. Review, discuss and take action as appropriate on a remaining 2021 Annual Financial Disclosure Form from a Planning & Zoning Commissioner.

City Council Members:

**A motion was made by Commissioner Rios, seconded by Commissioner Rowe, to accept the Amended AFD Form of Council Member Maxfield Baker. The motion carried by the following vote:**

**For :** 5 - Chair Lollar, Commissioner Garcia, Commissioner Rios, Commissioner Rowe, and Commissioner Teehan

**Against:** 0

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

**A motion was made by Commissioner Teehan, seconded by Commissioner Garcia, to accept the Amended AFD Form of Mayor Jane Hughson. The motion carried by the following vote:**

**For :** 5 - Chair Lollar, Commissioner Garcia, Commissioner Teehan, and Commissioner Rios, Commissioner Rowe

**Against:** 0 -

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

**A motion was made by Commissioner Rios, seconded by Commissioner Rowe, to accept Council Member Shane Scott's\_ amended 2021 AFD Form to clarify real property ownership for the listing in Item #5. The Commission agreed to accept the clarification without a vote. motion carried by the following vote: Accepted without a Vote.**

**A motion was made by Commissioner Rios, seconded by Commissioner Rowe, to request Council Member Gonzales to submit an amended 2021 AFD Form to provide clarity and completeness of all listings in Item #5 to determine their present use. The motion carried by the following vote:**

**For :** 5 - Chair Lollar, Commissioner Garcia, Commissioner Rios, Commissioner Tehan, and Commissioner Rowe

**Against:** 0

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

### Planning & Zoning Commission:

**A motion was made by Commissioner Rowe, seconded by Commissioner Rios, to accept the Amended AFD Form of Planning and Zoning Commissioner Travis Kelsey. The motion carried by the following vote:**

**For :** 5 - Chair Lollar, Commissioner Garcia, Commissioner Rios, Commissioner Rowe, and Commissioner Teehan

**Against:** 0

**Absent:** 2 - Commissioner Armer and Commissioner Chandler

NOTE: The 2021 Amended AFD Forms for P & Z Commissioner Agnew and Commissioner Case were still not provided, at the time of this meeting.

NOTE: The 2021 AFD Form for P&Z Commissioner Costilla was still not provided, at the time of this meeting.

#### IV. Discussion and Recommendations for Future Agenda Items.

ERC regular meeting on October 11, 2022:

- review, discuss, and take action, as appropriate, on Ethics Review Commission recommendations to City Council
- review and discuss initial and/or amended 2021 Annual Financial Disclosure Forms for Council and P&Z Commission
- Keep same verbiage on Agenda Items #1 - #4 ("Review, discuss, and take action, as appropriate")
- Approval of Motion Minutes

#### V. Question and Answer Session with Press and Public.

None were present for questions and answers from press and public.

#### VI. Adjournment

**The Regular Meeting of the Ethics Review Commission meeting was unanimously adjourned at 6:19 p.m.**

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Michael Cosentino, Staff Liaison

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Jonathan Lollar, Chair

**Lacey, Monika**

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**From:** Burrell, Cesly  
**Sent:** Thursday, August 11, 2022 9:14 AM  
**To:** Lacey, Monika  
**Subject:** FW: [EXTERNAL] Disclosure Statement

**RECEIVED**

**AUG 11 2022**

CITY OF SAN MARCOS  
CITY ATTORNEY'S OFFICE



**Cesly Burrell**

Administrative Coordinator | Planning & Development Services  
630 E Hopkins, San Marcos, TX 78666  
512.393.8231

Please take a moment to complete the City of San Marcos [Customer Satisfaction Survey](#).

**From:** William Agnew <wagnew@austin.rr.com>  
**Sent:** Wednesday, April 13, 2022 5:54 PM  
**To:** Burrell, Cesly <CBurrell@sanmarcostx.gov>  
**Subject:** [EXTERNAL] Disclosure Statement

Cesly,

I received two questions from Tina Moreno about my Disclosure Statement and, either for technical reasons or my own incompetence, I can't send an email directly to her. Could you please forward this email to her.

In response to Ms. Moreno's questions:

Page 1 – Item #1: The amount of Income from Social Security should be Category III.

Page 2 – Item #4: The only address I have for both Enterprise Partners, L.P. and Nustar Energy L.P. is :  
P.O. Box 799060  
Dallas, TX 75379-9060.

If Ms. Moreno needs any additional information, please email me at [wagnew@austin.rr.com](mailto:wagnew@austin.rr.com) . I can't reply from my city email account. Thank you.

William Agnew

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Sent from [Mail](#) for Windows

**CAUTION:** This email is from an EXTERNAL source. Links or attachments may be dangerous. Click the Report Phishing button above if you think this email is malicious .

## Lacey, Monika

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**From:** Burrell, Cesly  
**Sent:** Thursday, August 11, 2022 9:11 AM  
**To:** Lacey, Monika  
**Subject:** FW: DCase Financial Statement  
**Attachments:** DCase\_COSM\_Financial Report.pdf



**Cesly Burrell**  
Administrative Coordinator | Planning & Development Services  
630 E Hopkins, San Marcos, TX 78666  
512.393.8231

Please take a moment to complete the City of San Marcos [Customer Satisfaction Survey](#).

**From:** Case, David <[DCase@sanmarcostx.gov](mailto:DCase@sanmarcostx.gov)>  
**Sent:** Friday, May 6, 2022 3:50 PM  
**To:** Burrell, Cesly <[CBurrell@sanmarcostx.gov](mailto:CBurrell@sanmarcostx.gov)>  
**Subject:** Re: DCase Financial Statement

Hi Cesly - Attached are my edits and the document has been notarized. Hope you have a great weekend.

Thanks

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**From:** Moreno, Tina <[TMoreno@sanmarcostx.gov](mailto:TMoreno@sanmarcostx.gov)>  
**Sent:** Monday, May 2, 2022 2:59 PM  
**To:** Burrell, Cesly <[CBurrell@sanmarcostx.gov](mailto:CBurrell@sanmarcostx.gov)>; Case, David <[DCase@sanmarcostx.gov](mailto:DCase@sanmarcostx.gov)>  
**Subject:** RE: DCase Financial Statement

Commissioner Case,

Thank you for providing your 2021 Annual Disclosure. After initial review, the following edits are needed:

Page 1

- Item 1: all Category VI listings must also include the dollar amount, rounded to the nearest \$100,000

Page 3

- Item 6: Category VI listing must include the dollar amount, rounded to the nearest \$100,000

Please update your disclosure form with the above-referenced edits and resubmit to Cesly.

Kind regards,



**Tina Moreno**

Administrative Coordinator | Legal  
630 E Hopkins, San Marcos, TX 78666  
512.393.8151

Please take a moment to complete the City of San Marcos [Customer Satisfaction Survey](#).

**From:** Burrell, Cesly <[CBurrell@sanmarcostx.gov](mailto:CBurrell@sanmarcostx.gov)>

**Sent:** Monday, May 2, 2022 2:15 PM

**To:** Moreno, Tina <[TMoreno@sanmarcostx.gov](mailto:TMoreno@sanmarcostx.gov)>

**Subject:** FW: DCase Financial Statement



**Cesly Burrell**

Administrative Coordinator | Planning & Development Services  
630 E Hopkins, San Marcos, TX 78666  
512.393.8231

Please take a moment to complete the City of San Marcos [Customer Satisfaction Survey](#).

**From:** Case, David <[DCase@sanmarcostx.gov](mailto:DCase@sanmarcostx.gov)>

**Sent:** Monday, May 2, 2022 2:12 PM

**To:** Burrell, Cesly <[CBurrell@sanmarcostx.gov](mailto:CBurrell@sanmarcostx.gov)>

**Subject:** DCase Financial Statement

Hi Cesly,

I'll be able to submit a notarized version tomorrow. In the interim, my financial statement is attached.

Hope all is well.

Thanks

**City of San Marcos  
City Council/Council Appointee/P&Z Commissioner  
Annual Financial Disclosure Form**

NOTES

1. This report covers the reporting period from January 1 – December 31: 2021
2. Do **not** leave items blank. If item is not applicable, mark NA or NONE.
3. Attach information on additional pages, if necessary, or use keyboard button ENTER to expand field/item.

Name: David Case

Residence address: 440 Stagecoach Trl. San Marcos, TX 78666

Title of position held with the City: Planning & Zoning Commissioner

Name of spouse: Jamie Lee Case NA or NONE

Names of all dependent children: \_\_\_\_\_ NA or NONE ✓

Names under which you, your spouse, or any of your dependent children do business: NA or NONE

1. Jamie Lee Case, Associate Travel Advisor, Cruise Planners Kelley Austin

2. \_\_\_\_\_

3. \_\_\_\_\_

NOTE – You may use the following reporting categories to describe amounts and values:

<b>Category I</b> – At least \$100.00 but less than \$10,000.00
<b>Category II</b> – At least \$10,000.00 but less than \$20,000.00
<b>Category III</b> – At least \$20,000.00 but less than \$50,000.00
<b>Category IV</b> – At least \$50,000.00 but less than \$75,000.00
<b>Category V</b> – At least \$75,000.00 but less than \$100,000.00
<b>Category VI</b> – \$100,000.00 or more – <b>MUST</b> report to nearest \$100,000.00 (For example: \$125,000 would be reported to \$100,000)

1. Identify each source of income amounting to more than \$100.00 received in the reporting period by you, your spouse, or any of your dependent children: NA or NONE

Name & full address of income source	Nature of income [e.g., salary, dividends, rent, etc.]	Amount of income [by reporting category]	Income of [e.g., self, spouse, or dependent child]
Schertz Bank & Trust 2202 Hunter Rd. San Marcos, TX 78666	Salary	VI \$100,000	self
City of San Marcos 630 E Hopkins St. San Marcos, TX 78666	Salary	VI \$100,000	spouse
Jamie Lee Case - Cruise Planners 440 Stagecoach Trl San Marcos, TX 78666	contract labor	I \$4,000	spouse



2. Identify each option held, owned, acquired or sold by you, your spouse, or any of your dependent children during the reporting period: **NA or NONE** ✓

Nature of option [real estate, stock, etc.]	Amount of transaction [by reporting category]	Name & full address of other parties to the transaction

3. Identify each business entity, nonprofit entity or union in which you, your spouse, or any of your dependent children was a partner, manager, officer, member of the board of directors, proprietor or beneficiary during the reporting period: **NA or NONE**

Name & full address of business or nonprofit entity or union	Position held
San Marcos Sights & Sounds of Christmas, Inc. 202 N CM Allen Pkwy San Marcos, TX 78666	Self - President
San Marcos Chamber of Commerce, Inc. 202 N CM Allen Pkwy San Marcos, TX 78666	Self - Past Chair
Hays County Food Bank 220 Herndon St. San Marcos, TX 78666	Spouse - President

4. Identify each business entity, nonprofit entity or union in which you, your spouse, or any of your dependent children had an ownership interest with a fair market value of more than \$100.00 at any time during the reporting period: **NA or NONE** ✓

Name & full address of business or nonprofit entity or union	Description of ownership interest [e.g., owner, partner, stockholder]	Value of ownership interest [by reporting category]	Number of shares held/shares issued [if applicable]	Net gain or loss from sale of stock [by reporting category]

5. Identify any real property in the City or ETJ in which you, your spouse, or any of your dependent children had an interest as owner, beneficial owner (holder of a mortgage), business owner (partner in a partnership; or board member, officer or owner of more than 5% of stock of a corporation), or a leaseholder:

NA or NONE ✓

Full address or legal description	Name & full address of owner(s) [if other than you, your spouse or children]	Fair market value [by reporting category] and present use	For leased property, annual rental amount [by reporting category]	Homestead exemption on this property?
440 Stagecoach Trl. San Marcos, TX 78666 Homestead		\$347,590		Yes

6. Identify persons, business entities or guarantors to whom you, your spouse, or any of your dependent children owed a debt of more than \$100.00 during the reporting period (not including debts owed to persons related within the second degree of consanguinity or affinity, or loans to a political campaign which were reported as required by law):

NA or NONE

Name & full address of person, business entity or guarantor to which debt was owed	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]
David & Jamie Lee Case 440 Stagecoach Trl. San Marcos, TX 78666	VI \$300,000	II \$20,000
Chuck Nash Chevrolet Buick GMC 3209 N IH 35 San Marcos, TX 78666	IV \$50,000	II \$10,000

7. Provided this information is not privileged by law, identify persons, business entities or guarantors who owed you, your spouse, or any of your dependent children a debt of more than \$100.00 during the reporting period (not including debts owed by persons related within the second degree of consanguinity or affinity):

NA or NONE ✓

Name & full address of person, business entity or guarantor that owed the debt	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]

Name & full address of person, business entity or guarantor that owed the debt	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]

8. Identify the source of each gift or accumulation of gifts from one source of more than \$100.00 in value received during the reporting period by you, your spouse, or any of your dependent children, or received by another person for the use and benefit of you, your spouse, or any of your dependent children (not including (1) a gift received from a relative if given because of kinship, or (2) a gift received by will, by intestate succession or as distribution from an inter vivos or testamentary trust established by a spouse or ancestor):

**NA or NONE** ✓

Name & full address of source of gift(s)	Description of gift(s)	Amount or value of gift(s) [by reporting category]

9. Provided this information is not privileged by law, if you were the owner of 5% or more of any business entity during the reporting period, list all customers from whom the entity received at least 10% of its gross income during the reporting period:

**NA or NONE** ✓

Name and full address of customer

10. Identify any financial interest in any franchisee of the City held during the reporting period by you, your spouse, or any of your dependent children [note: franchise holders are A) Spectrum Cable, B) Pedernales Electric Cooperative, C) Bluebonnet Electric Cooperative, D) CenterPoint Energy, and E) SiEnergy]:

NA or NONE

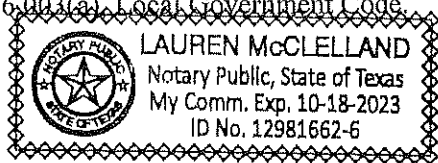
Name of franchise holder	Description of financial interest held [stock, mortgage, note etc.]	Value of financial interest [by reporting category]

11. Identify any transaction during the reporting period by you, your spouse, or any of your dependent children with any holder of any franchise issued by the City, other than as a customer or patron:

NA or NONE

Name of franchise holder	Description of transaction	Value of transaction [by reporting category]

AFFIDAVIT I swear under penalty of perjury that the above statement is true and correct. I acknowledge that the disclosure applies to a family member (as defined by Section 176.001(2), Local Government Code) of this local government officer. I also acknowledge that this statement covers the 12-month period described by Section 176.003(a), Local Government Code.



David Case  
Signature of Local Government Officer/Appointed Official

AFFIX NOTARY STAMP / SEAL ABOVE

Sworn to and subscribed before me, by the said David Case, this the 6<sup>th</sup> day of May, 2022, to certify which, witness my hand and seal of office.

Lauren McClelland  
Signature of officer administering oath

Lauren McClelland  
Printed name of officer administering oath

Notary  
Title of officer administering oath

APR 29 2022

City of San Marcos  
 City Council/Council Appointee/P&Z Commissioner  
 Annual Financial Disclosure Form

CITY OF SAN MARCOS  
 CITY ATTORNEY'S OFFICE

NOTES

1. This report covers the reporting period from: Jan. 1, 2021 - Dec 31, 2021
2. Do not leave items blank. If item is not applicable, mark NA or NONE.
3. Attach information on additional pages, if necessary.

Name: Mark C Gleason  
 Residence address: 909 Conway Dr. San Marcos TX 78666  
 Title of position held with the City: San Marcos City Council Place 5  
 Name of spouse: Ruah Gleason NA or NONE   
 Names of all dependent children: Mark Declan Gleason NA or NONE

Names under which you, your spouse, or any of your dependent children do business: NA or NONE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

NOTE – You may use the following reporting categories to describe amounts and values:

Category I –	At least \$100.00 but less than \$10,000.00
Category II –	At least \$10,000.00 but less than \$20,000.00
Category III –	At least \$20,000.00 but less than \$50,000.00
Category IV –	At least \$50,000.00 but less than \$75,000.00
Category V –	At least \$75,000.00 but less than \$100,000.00
Category VI –	\$100,000.00 or more – report to nearest \$100,000.00

1. Identify each source of income amounting to more than \$100.00 received in the reporting period by you, your spouse, or any of your dependent children: NA or NONE

Name & full address of income source	Nature of income [e.g., salary, dividends, rent, etc.]	Amount of income [by reporting category]	Income of [e.g., self, spouse, or dependent child]
Hays CISTD Tobias Elem. School 21003 IH 35 Kyle TX 78640	Salary	IV	Spouse
City of San Marcos 630 E. Hopkins San Marcos TX 78666	stipend (for council)	II	Self

2. Identify each option held, owned, acquired or sold by you, your spouse, or any of your dependent children during the reporting period: NA or NONE

Nature of option [real estate, stock, etc.]	Amount of transaction [by reporting category]	Name & full address of other parties to the transaction

3. Identify each business entity, nonprofit entity or union in which you, your spouse, or any of your dependent children was a partner, manager, officer, member of the board of directors, proprietor or beneficiary during the reporting period: NA or NONE

Name & full address of business or nonprofit entity or union	Position held

4. Identify each business entity, nonprofit entity or union in which you, your spouse, or any of your dependent children had an ownership interest with a fair market value of more than \$100.00 at any time during the reporting period: NA or NONE

Name & full address of business or nonprofit entity or union	Description of ownership interest [e.g., owner, partner, stockholder]	Value of ownership interest [by reporting category]	Number of shares held/shares issued [if applicable]	Net gain or loss from sale of stock [by reporting category]

5. Identify any real property in the City or ETJ in which you, your spouse, or any of your dependent children had an interest as owner, beneficial owner (holder of a mortgage), business owner (partner in a partnership; or board member, officer or owner of more than 5% of stock of a corporation), or a leaseholder:

NA or NONE

Full address or legal description	Name & full address of owner(s) [if other than you, your spouse or children]	Fair market value [by reporting category] and present use	For leased property, annual rental amount [by reporting category]	Homestead exemption on this property?
909 Conway Dr. San Marcos TX 78666	/	residence \$193,000		yes

6. Identify persons, business entities or guarantors to whom you, your spouse, or any of your dependent children owed a debt of more than \$100.00 during the reporting period (not including debts owed to persons related within the second degree of consanguinity or affinity, or loans to a political campaign which were reported as required by law):

NA or NONE

Name & full address of person, business entity or guarantor to which debt was owed	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]
Small Business Administration Washington DC 409 3rd St SW 20416	III	I
American Education Services 1209 N 7th St Harrisburg PA 17102	III	I

7. Provided this information is not privileged by law, identify persons, business entities or guarantors who owed you, your spouse, or any of your dependent children a debt of more than \$100.00 during the reporting period (not including debts owed by persons related within the second degree of consanguinity or affinity):

NA or NONE

Name & full address of person, business entity or guarantor that owed the debt	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]

Name & full address of person, business entity or guarantor that owed the debt	Amount of debt [by reporting category]	Amount of repayment during reporting period [by reporting category]

8. Identify the source of each gift or accumulation of gifts from one source of more than \$100.00 in value received during the reporting period by you, your spouse, or any of your dependent children, or received by another person for the use and benefit of you, your spouse, or any of your dependent children (not including (1) a gift received from a relative if given because of kinship, or (2) a gift received by will, by intestate succession or as distribution from an inter vivos or testamentary trust established by a spouse or ancestor):

NA or NONE

Name & full address of source of gift(s)	Description of gift(s)	Amount or value of gift(s) [by reporting category]
Donald Gleason Estate 603 N. Madison Lincoln IL 62656	inheritance	II

9. Provided this information is not privileged by law, if you were the owner of 5% or more of any business entity during the reporting period, list all customers from whom the entity received at least 10% of its gross income during the reporting period:

NA or NONE

Name & full address of customer



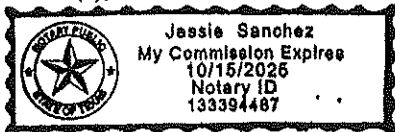
10. Identify any financial interest in any franchisee of the City held during the reporting period by you, your spouse, or any of your dependent children [note: franchise holders are A) Time Warner Cable, B) Pedernales Electric Cooperative, C) Bluebonnet Electric Cooperative, and D) CenterPoint Energy Entex]:  
 NA or NONE

Name of franchise holder	Description of financial interest held [stock, mortgage, note etc.]	Value of financial interest [by reporting category]

11. Identify any transaction during the reporting period by you, your spouse, or any of your dependent children with any holder of any franchise issued by the City, other than as a customer or patron:  
 NA or NONE

Name of franchise holder	Description of transaction	Value of transaction [by reporting category]

**AFFIDAVIT** I swear under penalty of perjury that the above statement is true and correct. I acknowledge that the disclosure applies to a family member (as defined by Section 176.001(2), Local Government Code) of this local government officer. I also acknowledge that this statement covers the 12-month period described by Section 176.003(a), Local Government Code.



Mark Gleason  
 Signature of Local Government Officer/Appointed Official

AFFIX NOTARY STAMP / SEAL ABOVE

Sworn to, and subscribed before me, by the said Mark C. Gleason this the 29th day of April, 2022, to certify which, witness my hand and seal of office.

Jessie Sanchez  
 Signature of officer administering oath

Jessie Sanchez  
 Printed name of officer administering oath

Admin Asst Sr.  
 Title of officer administering oath

**ORDINANCE NO. 2022-**

**AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS AMENDING THE SAN MARCOS CODE OF ETHICS TO ADD PROVISIONS RELATING TO REVIEW BY THE ETHICS REVIEW COMMISSION (ERC) OF ANNUAL FINANCIAL DISCLOSURE STATEMENTS SUBMITTED BY CITY COUNCIL MEMBERS, PLANNING AND ZONING COMMISSIONERS, AND THE FOUR CITY COUNCIL APPOINTEES; REQUIRING PERIODIC REVIEW BY THE ERC OF CAMPAIGN FINANCE REPORTS TO DETERMINE COMPLIANCE WITH THE INDIVIDUAL CONTRIBUTION LIMIT AND AGGREGATE FUND-RAISING LIMITS SET BY THE CODE; AND PROVIDING AN EFFECTIVE DATE.**

**BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS:**

**SECTION 1.** Section 2.443 of the San Marcos City Code is hereby amended to read as follows (added language is underlined):

**Sec. 2.443. Authority and duties.**

- (a) *Generally.* The ethics review commission shall act as authorized by section 12.02 of the Charter concerning conflicts of interest, ethical conduct or interests of city officials and employees.
- (b) *Review and recommendations.* The commission will meet at least once a year to review this article and may make recommendations to the city council.
- (c) *Hearings.* The commission shall consider and conduct hearings on complaints of violations of this article and of state conflict of interest laws in accordance with Section 2.444.
- (d) *Advisory opinions.* The commission shall render advisory opinions on potential conflicts of interest or violation of this article at the request of a public official or employee subject to the terms of this article. The opinion must relate to an action proposed to be taken by the person requesting the opinion.
- (e) *Opinions binding.* Any advisory opinion rendered by the commission to a person is binding on the commission in any subsequent complaint concerning the person about whom the opinion was requested and who acted in reliance on it in good faith, unless material facts were omitted or misstated by the person in connection with the opinion.
- (f) The commission shall review financial disclosure forms submitted under Section 2.462(a) by city council members, planning and zoning commissioners, city manager, city attorney, city clerk, and municipal court judge.

- (g) The commission shall review campaign finance reports on file with the city clerk to determine compliance with the individual contribution limit and aggregate fund-raising limits on campaign contributions set by Sections 2.467 and 2.468.

**SECTION 2.** Section 2.463.1 is hereby added to the San Marcos City Code to read as follows:

**Sec. 2.463.1. Review of financial disclosure statements**

- (a) The Ethics Review Commission shall review the financial disclosure statements submitted by city council members, planning and zoning commissioners, city manager, city attorney, city clerk and municipal court judge under Section 2.462(a).
- (b) The Commission may request correction, clarification, or explanation of information contained in such financial disclosure statements or completion of any missing information. All requests must be in writing and contain an explanation of the reasons why the Commission has requested a response from the officer or employee.
- (c) Upon receipt of a request from the Commission under the preceding subsection, the officer or employee shall either file a corrected financial disclosure statement with the city clerk or submit a written reply to the Commission within thirty (30) calendar days.

**SECTION 3.** Section 2.469 is hereby added to the San Marcos City Code to read as follows:

**Sec. 2.469. Review of individual and aggregate campaign contributions**

At least one time per calendar year, the Ethics Review Commission shall review the campaign finance reports on file with the city clerk to determine compliance with the individual contribution limit in Section 2.467 and the aggregate fund-raising limits in Section 2.468.

**SECTION 4.** If any word, phrase, clause, sentence, or paragraph of this ordinance is held to be unconstitutional or invalid by a court of competent jurisdiction, the other provisions of this ordinance will continue in force if they can be given effect without the invalid portion.

**SECTION 5.** All ordinances and resolutions or parts of ordinances or resolutions in conflict with this ordinance are repealed.

**SECTION 6.** This ordinance will take effect after its passage, approval and adoption on second reading.

**PASSED AND APPROVED** on first reading on October 3, 2022.

**PASSED, APPROVED AND ADOPTED** on second reading on October 18, 2022.

Jane Hughson  
Mayor

Attest:

Approved:

Elizabeth Trevino  
City Clerk

Michael J. Cosentino  
City Attorney

## Sec. 2.466. - Definitions.

In this division:

*Campaign contribution* means and includes a contribution to a candidate for mayor or city council in any of the following forms: a monetary contribution or a non-monetary contribution (in-kind contribution).

*Contributor* means a natural person or a business entity other than a corporation.

*Election cycle* means the period of time beginning on the day after the last general election for the office of mayor or council member of a particular council place and ending on the day of the next general election for that position.

(Ord. No. 2018-37, § 1, 9-18-18)

## Sec. 2.467. - Individual contribution limit.

A contributor may not make campaign contributions in an amount exceeding \$500.00 per election cycle to a candidate for mayor or to a candidate for council member of a particular council place. This limit does not apply to contributions by a candidate to his or her own campaign.

(Ord. No. 2018-37, § 1, 9-18-18)

## Sec. 2.468. - Aggregate fund raising limits.

- (a) *Candidates for mayor.* A candidate for the office of mayor, including an incumbent mayor, shall not accept campaign contributions during an election cycle in an amount exceeding an aggregate limit to be determined as follows: An amount equal to \$0.75 multiplied by the number of registered voters in the city on the date of the last election for the office of mayor. The aggregate limit shall not include contributions made by a candidate to his or her own campaign.
- (b) *Candidates for city council positions.* A candidate for the position of council member of a particular council place, including an incumbent council member, shall not accept campaign contributions during an election cycle in an amount exceeding an aggregate limit to be determined as follows: An amount equal to \$0.50 multiplied by the number of registered voters in the city on the date of the last election for any council position. The aggregate limit shall not include contributions made by a candidate to his or her own campaign.

(Ord. No. 2018-37, § 1, 9-18-18)