

OFFICE OF THE INDEPENDENT BUDGET ANALYST REPORT

Date Issued: January 30, 2006

IBA Report Number: 06-5

Budget & Finance Committee Agenda Date: February 1, 2006

Item Number: ITEM-1

Item: Report from the Independent Budget Analyst's Office on Internal Procedures

OVERVIEW

On November 2, 2004, voters of the City of San Diego approved Proposition F, changing the City to a Mayor-Council form of government for a five year trial period. Coincident to the implementation of a Mayor-Council form of government, Proposition F also provided for the establishment of an Office of Independent Budget Analyst (IBA) by the City Council. The mission of the IBA is to provide clear, objective and unbiased analysis and advice to the City Council regarding all legislative items bearing a financial impact to the City of San Diego.

This report establishes the policies and procedures that are necessary for the IBA to conduct a thorough review of all legislative items that bear a financial impact to the City of San Diego. While adherence to these policies may prove difficult initially, they will ultimately provide for a more transparent and coordinated legislative process, and more complete and accurate information for the City Council and the public.

POLICIES AND PROCEDURES

The IBA requires sufficient time to review all items that are heard at City Council and Council Committee meetings. Because scheduling and docketing procedures are different for City Council meetings than for Council Committees, a different policy is established for each.

City Council Meetings

As established by the City Council docket coordinator, all items scheduled to be heard by the full City Council are required to be docketed by the Wednesday that is eight working days prior to the Monday Council meeting (see Attachment 2). All ordinances, resolutions, Reports to the City Council and other backup materials should be complete and final in order for an item to be docketed. Substitute resolutions and supplemental dockets will only be allowed in rare and extreme circumstances.

Policy #1: Docket closing will be on the Wednesday that is eight working days prior to the Monday Council meeting. All materials must be final in order for an item to be docketed.

In order for the IBA to notify the docket coordinator that an analysis will be performed on a particular item, the IBA needs to receive all pending docket items and backup materials, including 1472s, Reports to the City Council, memoranda, etc., by the Monday before the Wednesday docket closing, or 10 working days prior to the Council meeting. Draft materials that are largely complete will be acceptable for this submittal deadline.

Policy #2: Backup materials for all pending City Council docket items must be submitted to the IBA by the Monday prior to the docket closing. Draft materials that are largely completed are acceptable.

Due to the voluminous nature of the City's legislative agenda, not all docketed items will be analyzed by the IBA. Items will be subject to review at the IBA's discretion and upon request by the City Council. In most cases, it will not be known ahead of time which items will be subject to review, so all items should be submitted to the IBA by the appropriate deadline. If the IBA determines that an item requires an analysis and report, the appropriate department(s) will be notified by the Tuesday prior to docket closing.

Policy #3: Not all docketed items will be analyzed. Review will be subject to IBA discretion and request by the City Council.

The IBA recognizes that immediate adherence to these policies may be difficult to achieve, as it represents a change from past practices. In order to facilitate this procedural transition, the IBA will accommodate an abbreviated review period for all items scheduled to be heard prior to the Council meeting on March 20th. Beginning with the March 20th Council meeting, all items will be held to the policies set forth in this report. All items scheduled to be docketed for the Council meetings on March 20th and 21st will have to be received by the IBA by no later than March 6th, and docketed by March 8th (see Attachment 2).

Council Committee Meetings

The IBA will not usually release a formal report on items that are to be heard at Committee meetings, but may instead perform a brief analysis and prepare questions and comments in order to facilitate discussion. To ensure adequate review time, all backup materials will need to be received no later than the Wednesday five working days prior to the scheduled Committee meeting.

Policy #4: Backup materials for all docketed Committee items must be received one week (five working days) in advance of the scheduled meeting.

Larger, more complex items that are scheduled to be heard at Committee meetings may require a longer review period, and will be handled on a case-by-case basis.

CONCLUSION

The Office of Independent Budget Analyst is charged with providing to the City Council clear, objective and unbiased analysis and advice regarding all legislative items bearing a financial impact to the City of San Diego. The policies and procedures established in this report will enable the IBA to achieve this mission, as well as provide for a more transparent and coordinated legislative process, and more complete and accurate information for the City Council and the public.

Respectfully submitted,

[SIGNED]

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AT/th

Attachments: 1. IBA Organization Chart
2. Example calendar of submittal timeframe