
OFFICE OF THE INDEPENDENT BUDGET ANALYST REPORT

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FY 2009 IBA Policy Matrix

OVERVIEW

Since its inception, the Office of the Independent Budget Analyst has made policy and financial recommendations to the City Council as part of its review of the Mayor's Proposed Budget. Last year, during our review of the Fiscal Year 2008 Budget, the IBA made thirty-three policy recommendations, which were intended to provide avenues for improved financial governance or increased efficiency and effectiveness. These items were explored and discussed over the course of the fiscal year, and the IBA tracked progress and reported periodically to the Budget and Finance Committee. At the request of the committee, the IBA also posted the Policy Matrix and updates to the IBA website.

Significant accomplishments reported on the Policy Matrix during FY 2008 included City Council review and approval of:

- *Reserves Policy*
- *Debt Policy*
- *Investment Policy*
- *Establishment of Retiree Health Trust with CalPERS*
- *Cost-recoverable fee for Automated Refuse Container Replacement*
- *Revisions to Council Policy 700-02 for CDBG Programming*

In developing the FY 2009 IBA Policy Matrix, our office compiled inputs from various sources, including: 1) requests made by Council members in their budget memorandum; 2) items requiring monitoring during the year due to budgetary impacts; and 3) issues previously identified that have not yet been completed. The FY 2009 IBA Policy Matrix contains thirty-one recommendations, and suggestions have been provided as to the Council subcommittees that may be the appropriate venue for specific reports or actions to occur.

Following the review of these items by the Budget and Finance Committee, the IBA will distribute information to affected departments and City staff and provide assistance, as

needed, in these areas, and will track and periodically report the status of the Policy Matrix to the Budget and Finance Committee.

FISCAL/POLICY DISCUSSION

The thirty-one recommendations contained in the FY 2009 Policy Matrix reflect many of the City's top priorities, including increasing public safety, continuing to restore financial stability, and increasing efficiency and effectiveness.

Significant public safety issues that have been identified include:

- Fire-Rescue Department Station Master Plan
- Family Justice Center/YWCA Proposal
- Disaster Reimbursement Reporting
- Alcohol Beach Ban Evaluation
- Year-Round Winter Shelter

In the area of restoring financial stability, issues include:

- Redevelopment Agency Debt Repayment Plan
- CDBG Reforms
- Updates to financial policies for:
 - Budget Practices, including Monitoring
 - Cost Recovery/Fees
- Developing alternatives to Library Ordinance
- Creating long-term plan for Environmental Growth Fund

Significant issues in the area of increasing efficiency and effectiveness include:

- BPR/Managed Competition Status Updates
- Performance Measurement Reporting

CONCLUSION

The FY 2009 IBA Policy Matrix contains thirty-one recommendations, compiled from various sources. Following the review of these items by the Budget and Finance Committee, the IBA will distribute information to affected departments and City staff and provide assistance as needed in these areas, and will track and periodically report the status of the Policy Matrix to the Budget and Finance Committee.

[SIGNED]

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Approved: Andrea Tevlin
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Attachment: IBA Policy Matrix - Fiscal Year 2009