

Mayor/City Councilmember Office Budget Policy

Purpose

The City Council of National City, during the adoption of the Fiscal Year 2023-2024 City Budget, included a \$100,000 appropriation for each Councilmember's budget. The purpose of this policy is to establish uniform guidelines and procedures for the expenditure of the funds to ensure that the funds are expended in the best interests of the Council District and/or City, as applicable, and are consistent with the objectives of the City's Strategic Plan and City Council priorities.

Policy

- A. Each Councilmember must submit an Annual Appropriation Request for review by the Department of Finance and the City Manager as part of the City's annual budget adoption process.

Budget categories are as follows:

- *Personnel Services*
 - Part time positions
 - Full time positions
 - Professional services (consultants)
- *Governmental Purposes:* These expenditures must be consistent with the City's adopted Strategic Plan and City Council priorities and spent within the District of the Councilmember. (See attached Strategic Plan 2020 -2025).
- *Training, Travel and Subsistence:* These expenditures are for conferences or training registration fees, travel costs associated with getting to the training/conference, and lodging and meals during the training/conference. The training/conference must be directly related to City business and have a direct benefit to the City and, therefore, will be considered City business. When a Councilmember attends a conference/training at the expense of the City he/she must report out on the conference/training in accordance with AB 1234. Attachment 2 to this policy is the list of approved conferences and trainings. Conferences/trainings not listed will require City Council approval. All requests for reimbursement for travel and conference/training expenses

must be consistent with City Council Policy #109 and must be pre-approved by the Purchasing Review Committee.

- *Materials and Supplies:* These expenditures are for general office supplies, supplies for events or outreach. Purchase of materials and supplies must be consistent with the City's Purchasing Policy.
- B. *Professional Services:* Councilmembers may require, in addition to administrative support, services of a recurring nature or for a specific one-time project, which cannot be routinely provided by City staff, either because of the expertise required or the ongoing workload. Consultants may be employed where City staff is unable to accommodate this need.

It is the policy of the Council that the selection of consultants by Mayor and/or Councilmembers shall be made from as broad a base of applicants as possible and that the choice be based on demonstrated capabilities or specific expertise. The Council encourages the engagement of local consultants where possible. The type and scope of the required service or product must be clearly defined by the Mayor/Councilmember so the City Manager can determine whether it can be most efficiently provided by City staff or by a consultant and, where a consultant will be chosen, whether licensed or non-licensed services are necessary.

A minimum of three qualified consultants should be considered for selection except in those cases where unique expertise is required and can be provided only by a limited number of available consultants.

All consultant contracts must be reviewed by the City Attorney's Office for compliance with AB 5 and shall be on a City Attorney approved contract form. All consulting contracts which exceed \$50,000 shall be reviewed and approved by the City Council. At a minimum, the following information shall be provided to the Council for review:

* The length of time the consultant has been in the business required by the scope of work.

* Proof of expertise and demonstrated success in the field of expertise required by the scope of work.

* Disclosure of economic interests and relationships between the Mayor/Councilmember and the consultant.

For contracts below \$50,000, the City Manager has the discretion as to whether City Council approval is required.

- C. *Part Time and Full Time Personnel:* Part time and full time personnel shall be recruited and hired in accordance with the City's personnel hiring policies and practices.
- D. *Restrictions on the Use of Public Resources:* All expenditures are subject to the restrictions on the use of public funds including, but not limited to:
 - a. Gift of public funds prohibited.
 - b. Use of public funds or resources for political purposes is prohibited.
 - c. Political activities during the workday are prohibited.
 - d. Public resources cannot be used for political campaign activities.
- E. *Social Media:* To the extent public resources (i.e. funds or staff) are used for social media, the City's Social Media Policy is applicable. The Social Media Policy is Policy 1.13 and is located in the City Administrative Manual.
- F. *Reimbursement Procedure:* Prior to the expenditure, all reimbursement requests must be submitted to the Mayor (acting as the Department Head) for approval. The request shall show the details of the proposed expenditure with supporting documents. The Mayor shall review the request for compliance with this policy and any other applicable policy and affix his/her signature to signify approval and submit the request to the City Manager for final approval. Should the Mayor not approve a reimbursement request he/she shall notify the City Council within 24 hours of the denial and provide the basis for the denial. In the event the Mayor and City Manager disagree as to the approval/denial of the specific request, the request shall be submitted to the City Council for consideration.

G. District Budget Carryover: Council District funds shall be expended during the fiscal year approved. Unexpended funds shall not carry over into the next fiscal year.

H. Non-profits: Council District funds shall not be used to contribute to or support non-profit or tax-exempt organizations.



Strategic Focus Area# 1 - Balanced Budget and Economic Development

- a) Maximize economic development strategies.
- b) Partner with other public agencies and non-profits, to increase revenue and augment services.
- c) Manage pension and other employee expenses.
- d) Optimize City assets and lease property, when appropriate.

Strategic Focus Area # 2 - Communication and Outreach

- a) Prepare effective budget, close deficit, accurately forecast funding sources, manage investments wisely, provide consistent financial reports, maintain clean audits, resolve findings/deficiencies in a timely manner, and update finance and budget policies.
- b) Connect the community with timely and transparent information.
- c) Increase meaningful outreach through quality engagement.
- d) Improve emergency preparedness and public noticing.
- e) Promote educational and economic opportunities.

Strategic Focus Area # 3 - Health, Environment, and Sustainability

- a) Update and implement the Climate Action Plan.
- b) Support a healthy community through active living and healthy eating.
- c) Create health and education hubs around major transit stops.
- d) Support an age-friendly community.

Strategic Focus Area# 4 - Housing and Community Development

- a) Pursue new housing options at all income levels.
- b) Ensure preservation of existing affordable housing stock.
- c) Streamline permitting and improve code compliance.
- d) Enhance role in reducing homelessness.

Strategic Focus Area # 5 - Parks, Recreation, and Library

- a) Improve outreach and increase participation.
- b) Organize community events and support other gatherings.
- c) Seek reliable funding and synergize with South Bay partners.
- d) Develop volunteer program and community services plan.



STRATEGIC PLAN 2020-2025

Strategic Focus Area# 6 - Public Safety

- a) Reduce overall crime and illegal activity.
- b) Improve operational readiness and community resilience.
- c) Enhance recruitment and retention and promote public safety pipeline.
- d) Expand community engagement and increase visibility.

Strategic Focus Area # 7 - Transportation Choices and Infrastructure

- a) Expand mobility choices by improving access to transit, biking, walking, rolling, and parking management.
- b) Improve traffic safety through traffic calming and safe routes.
- c) Update capital needs assessment and funding strategies.
- d) Maintain infrastructure and establish measurable targets.

PRE-APPROVED CONFERENCES

- California League of Cities sponsored conferences/trainings.
- National League of Cities sponsored conference/trainings.
- APA (American Planning Association) sponsored conferences/trainings.
- SDAPA (San Diego American Planning Association) sponsored conferences/trainings.
- California Fair Political Practices Commission sponsored conferences/trainings.
- ICSC (International Council of Shopping Centers) sponsored conferences/trainings.
- Conferences/trainings approved during the Budget Adoption process.