

1.0 PURPOSE:

To describe the procedures to be followed by City departments for preparation of the City's Administrative/Fiscal Note.

2.0 ORGANIZATIONS AND PERSONS AFFECTED:

This policy applies to all City of West Allis departments, divisions, offices, boards, and committees.

3.0 POLICY:

It is the policy of the City to require an administrative/fiscal note on certain subjects being presented to the Common Council for action as required in 5.2.1.

4.0 REFERENCES:

None.

5.0 PROCEDURES:

5.1 RESPONSIBILITY

5.1.1 The Administrative/Fiscal note shall be prepared on a form approved by the Administration & Finance Committee and supplied by the City Administrator.

5.1.2 The appropriate department head (s) shall prepare the Administrative/Fiscal note if directed or requested per 5.2.1.

5.1.3 If the Administrative/Fiscal Note form is directed or requested per 5.2.1, the City Clerk shall ensure the form is present prior to the agenda deadline for the Common Council or committee meeting.

5.1.4 If a review/analysis of performance measurement is requested per 5.2.3, the City Administrator shall direct the appropriate staff members to perform the review.

5.1.5 Departments shall provide all requested information to staff members performing the review/analysis of performance measurement per 5.2.3.

5.2 GENERAL POLICIES

- 5.2.1 The Administrative/Fiscal Note form is required when the fiscal impact of the item is \$100,000 or greater, or is requested by the committee chair or is requested by the majority of committee or Common Council members present.
- 5.2.2 The Administrative/Fiscal Note form shall be used to present information regarding staffing, one-time costs, ongoing costs, savings, revenue gains or losses and other information requested by the Common Council.
- 5.2.3 A review/analysis of performance measurement will be conducted by the City Administrator or designee at the request of the majority of the committee or Common Council members present, at a timeline prescribed by the committee or Common Council and reported to the committee or Common Council as appropriate. Departments will timely provide information needed to conduct analysis.

## ADMINISTRATIVE/FISCAL NOTES

### Instructions

#### **ADMINISTRATIVE/FISCAL NOTE FORM.**

Each administrative/fiscal note shall be prepared on a form approved by the Administration & Finance Committee and supplied by the City Administrator.

#### **Part I. Date/File ID Number/Resolution No./Ordinance No.**

Enter the date, file number and ordinance number of the requested proposal. Indicate if this is the original fiscal note or a substitute.

#### **Submitted By**

Enter the name and department of the person preparing the fiscal note.

#### **Description**

Describe the subject and purpose of the project/program.

#### **Mandate**

Note if this program or request is mandated. Please attach relevant documentation.

#### **Sunset**

Note if there is a specific time frame involved.

**Part II. Expenditures/Services/Revenue**

Check appropriate boxes.

**Part III. Expenditures/Revenue.** Enter information regarding type/use. Indicate if ongoing, 1-3 year or 3-5 year cost.

Provide assumptions used in estimate.

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**Part IV. Revenue Source.**

Enter Department Account #.

Check boxes as appropriate.

**Part V. Impacts/Goals/Etc.**

Indicate and describe impacts.

Provide goals and performance criteria for file.

Describe the timetable for implementation.

Indicate need for new positions and IT resources needed.

**Part VI. Performance Measurement**

Indicate if the need and timeline for a future performance measurement review.