

County of Monterey Board Policy Manual

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Ballot Measure Fiscal Analysis and Impact Assessment	G-09	1 of 3
Policy Category Government and Administration		

I. Purpose

1. To establish criteria for Auditor-Controller to conduct fiscal analysis and prepare fiscal impact assessment reports for proposed ballot measures of Monterey County deemed to fiscally impact the Monterey County Government (Jurisdiction governed by the County Board) if such measure were ultimately approved.
2. Alleviate the need for the Board to adopt resolutions, on a case by case basis, directing the Auditor-Controller to conduct such analysis.

II. Background

Pursuant to California Elections Code 9160 parameters for conducting fiscal analysis and preparing fiscal impact assessment reports for proposed ballot measures are:

(c) Not later than 88 days before an election that includes a county ballot measure, the board of supervisors may direct the county auditor to review the measure and determine if the substance of the county ballot measure, if adopted, would affect the revenues or expenditures of the county. He or she shall prepare a fiscal impact statement which estimates the amount of any increase or decrease in revenues or costs to the county if the proposed measure is adopted. The fiscal impact statement is "official matter" [...], and shall be printed preceding the arguments for and against the measure. The fiscal impact statement may not exceed 500 words in length.

(Amended by Stats. 2016, Ch. 422, Sec. 42. (AB 2911) Effective January 1, 2017.)

Per Board referral #2020.28, dated December 8, 2020, it was requested that the Auditor-Controller Analyze and propose a policy that would authorize such reports to be prepared without board direction. The referral sought to create a consistent, apolitical, financial analysis of proposed changes after considering all potential costs and fiscal impacts to the County and its economy.

III. Policy

It is the policy of the County that:

1. The Auditor-Controller shall conduct a preliminary assessment of ballot measures of the County regarding the changes in revenue and costs that may result from the proposed ballot measure.
2. Based on preliminary assessment the Auditor-Controller may require additional resources to conduct or complete the analysis.

- a. Three to five weeks prior to conducting the analysis or during the period of conducting the analysis, the Auditor-Controller's Office (ACO) shall apprise the Board with any need for resources and the associated cost for budget approval consideration at its regularly scheduled meeting.
 - b. The ACO may also apprise the Board with a recommendation for which measures are to be selected for the analysis at times when ballot measures are numerous and there is a deficiency of available resources.
3. The Auditor-Controller shall conduct fiscal analysis and prepare a fiscal impact assessment statement on proposed ballot measures of the County if the measure is deemed by the Auditor-Controller to fiscally impact the County Government Jurisdiction.
4. The analysis shall be conducted in accordance with the applicable professional standards and the assessment statement shall be prepared in compliance with the provisions (excluding the Board's directive) of the Election Code 9160.
 - a. The assessment statement shall be forwarded to the County Elections Office for printing on ballots preceding the arguments for and against the measure and it shall not exceed 500 words in length.

IV. Procedure

The ACO shall conduct a preliminary assessment of proposed ballot measures of the County regarding the changes in revenue and costs that may result from the proposed ballot measure if such measure were ultimately approved. If the measure is deemed by the ACO to fiscally impact the County Government Jurisdiction, further analysis and fiscal impact assessment shall be conducted.

Three to five weeks prior to conducting the ballot measure analysis, or during the period of conducting the analysis, the ACO shall apprise the Board with any need for additional resources and associated cost for budget approval consideration at its regularly scheduled meeting. The ACO may also apprise the Board with a recommendation for which measures are to be selected for analysis at times when ballot measures are numerous and there is a deficiency of available resources. ACO's recommendation will be based on consideration factors such as level of fiscal impact; availability of resources, expert knowledge, data.

Relying on appropriate professional standards, the reports would provide the ACO assessment regarding fiscal impact to the County that may result from the proposed ballot measure. The assessments shall be forwarded to the Elections Office for inclusion on ballots.

V. Review Date

- a. This Policy will be reviewed for continuance by May 11, 2026.

VI. Board Action

- a. Legistar File Number 21-378, May 11, 2021.