

Budget Advocate Training around Meetings with Departments, the How-tos:

Prior to meeting

- Set up the meeting –
 - Who to contact and when; call & follow up with email as requested; ask to meet with the General Manager & Budget staff for 1 ½ hours. Note - you may meet with Deputies.
 - Call back in one or two days; confirm the time, date, location, and parking.
 - Two or more days before the meeting reconfirm and email names/number of Budget Advocates attending & include Talking Points.

- Notice & request RSVPs from Budget Advocates, identify who will attend – 4 to 6 individuals is a good number; invite Budget Representatives as appropriate. Meet with Budget Advocates 15 or more minutes in advance of meeting with the Department.
- Prepare BAs et al for the meeting – identify specific resources for information including website, roster, last year's budget, last year's BA report, etc. (sample resource list)
- Meet with Committee Members, share resources, ask for input to the Talking Points. Make phone calls to follow up with BAs et al to assure good attendance.
- Committee agrees who will (1) lead the meeting (2) take notes and/or record the Department meeting (3) write draft of the report (4) Committee members add to & okay recommendations.
- Put together Talking Points - assure you have necessary info for your report, include current events that may affect the Budget. (sample Talking Points)
- Remind all BAs of the meeting; meet with Budget Advocates 15 or more minutes in advance of meeting with the Department.

The meeting

- Be prepared, dress professionally, arrive early.
- Meet with Budget Advocate committee at set time before meeting with the Department. Go over the plan for the meeting.
- What to expect – who may attend from the Dept.
- Ask permission to record (for accuracy in your report) and/or take complete notes
- What are the Department's goals – Mayor's mandate, Department's agenda
- Lead the meeting - introductions, BA calling cards, move the agenda, non-agenda questions at the end.
- Strive for answers to all Talking Points.
- How can BAs assist the Department?
- Ask for follow-up, okay to call with additional questions, clarifications?

After the meeting

- Follow up with the Department on unanswered questions/clarifications, documents offered by the Department.
- Prepare draft report. (sample report)
- Share the report with Budget Advocates attending and on the Committee; ask for feedback.
- Present the report to Budget Advocates.
- Share report with the Department.
- White Paper Committee creates a list of recommendations for the CAO Analyst to discuss with the Departments. (CAO suggests submitting recommendations early in the Budget process.)

Budget Hearings

- After the Mayor's budget is released and just prior to their appearance before B&F Committee ask the Departments about their budget requests and how BAs can assist with their request.
- Assure Budget & Finance Committee (B&F) has your Department's report before the date B&F meets with that Department. (CAO suggestion)
- Appear at Budget & Finance hearing the day the Department meets with B&F. (CAO suggestion)
- Appear before B&F Committee with Budget Advocates to focus on specific item/s, bring with you copies of your report & consider referring to it.
- Check Department report-backs to B&F Committee.
- Appear before City Council if appropriate.
- Review CAO response to BA recommendations and discuss as appropriate.

Throughout the year

- Keep tabs on important Department issues.
- Look at CAO's quarterly Financial Status Reports.
- Provide support for additional Department requests as appropriate.

Further training - Meet with Mayor's Budget staff and CAO staff to further understand City budget policy and financial principles.