



## Agenda Item Staff Report

**To:** Honorable Mayor and Members of City Council  
*For the Meeting of September 10, 2024*

**From:** Chris Constantin, City Manager

**Prepared by:** Michael O'Brien, Director of Administrative Services

**Subject:** Authorize the City Manager to Enter into a Subscription Agreement with Polco Confluence, Inc. in An Amount of \$9,000 Per Year for the Bundle of Products Which Includes the Budget Simulator, Prioritize and Taxpayer Receipt, in a form approved by the City Attorney.

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### **SUMMARY**

Staff is requesting approval to enter into a subscription agreement with POLCO to implement the Balancing Act suite, which includes Balancing Act, Prioritize, and Taxpayer Receipt. These tools will significantly enhance public engagement in the City's budgeting process by providing residents with interactive and user-friendly platforms to understand, prioritize, and visualize the City's financial decisions.

### **RECOMMENDATION**

Staff recommends the Council:

- Authorize the City Manager to enter into a subscription agreement with Polco Confluence, Inc. in an amount of \$9,000 per year for the bundle of products which includes the budget simulator, Prioritize and taxpayer receipt, in a form approved by the City Attorney.

### **FISCAL IMPACT**

The annual cost of the subscription is \$9,000. The subscription will be funded through the existing budget allocated for technology and subscriptions.

### **BACKGROUND**

POLCO's Balancing Act suite is a comprehensive set of tools designed to engage the public in government budgeting processes. The tools included in this bundle are Balancing Act, Prioritize,

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and Taxpayer Receipt. Each tool offers innovative ways to increase transparency, foster community involvement, and educate residents about fiscal policies.

Numerous local governments have successfully implemented the Balancing Act suite to enhance their budgeting processes. Notably, the City of Corona, California, has utilized these tools to engage residents in their budgeting decisions. The City of Corona has reported increased public participation and more informed decision-making as a result of using Balancing Act. This adoption by a nearby city underscores the effectiveness of these tools in fostering community involvement and improving the overall budgeting process.

## **DISCUSSION/ANALYSIS**

Implementing the Balancing Act suite from POLCO will provide the City with powerful tools to engage the public in the budgeting process. The benefits of these tools include:

1. **Enhanced Public Understanding:** The Balancing Act simulation tool simplifies complex budget data, allowing residents to make informed decisions by adjusting budget allocations in a simulated environment. This interactive approach replaces traditional methods, such as static PDF documents, making the budgeting process more accessible and understandable.
2. **Data-Driven Decision Making:** The Prioritize tool goes beyond simple surveys by enabling residents to rank and order projects based on their preferences. This dual approach offers deeper insights into community priorities, assisting city officials in making decisions that reflect the true needs and desires of the public.
3. **Increased Transparency and Accountability:** The Taxpayer Receipt tool provides residents with a clear and detailed account of how their tax contributions are utilized. This transparency strengthens public trust and fosters a more informed and engaged community.
4. **User-Friendly and Efficient:** All tools within the Balancing Act suite are designed to be user-friendly, with simulations and reports that can be set up in a short amount of time. This efficiency reduces the burden on city staff while maximizing the benefits of public engagement.
5. **Active Public Engagement:** The Balancing Act tool also allows residents to actively participate in the budget process by providing feedback on spending priorities. This level of engagement is essential for making informed decisions that reflect the community's needs and preferences. Residents can easily navigate the tool, understand complex budget data, and participate in meaningful ways. Such engagement ensures that budgeting decisions are more aligned with public sentiment, leading to greater satisfaction and better governance.

By adopting the POLCO Balancing Act suite, the City of San Dimas will join other local governments, such as the City of Corona, in utilizing innovative tools to promote inclusive, transparent, and data-driven governance, ultimately leading to better outcomes for the community.

## **ALTERNATIVES**

- The City Council could choose not to enter into the agreement with POLCO, resulting in continued reliance on traditional, less interactive methods of public engagement in the budgeting process.

Approve the City Manager to Enter into a Subscription Agreement with Polco Confluence, Inc.

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- The City Council could request further information or modifications to the proposed agreement before making a decision.

**ENVIRONMENTAL REVIEW**

Pursuant to CEQA guidelines Section 15061 (b)(3), CEQA does not apply to this item because there is no potential for causing a significant effect on the environment. Therefore, no additional environmental review is needed at this time.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Michael O'Brien". The signature is fluid and cursive, with the first name "Michael" being more prominent than the last name "O'Brien".

Michael O'Brien  
Director of Administrative Services

Attachments:

1. Polco Agreement