



Legistar Lunch & Learn

Fiscal Notes and General Tips
April 24, 2025 | 11:30am – 12:30pm

Agenda

- Welcome & Introductions
- Fiscal Note Approval Process
- Referrals & Agendas
 - How do I know what's going to my BCC?
 - Tips on notifying other BCCs about upcoming agenda items

Welcome!

Who is organizing this meeting?

- Volunteer staff team who regularly use Legistar and want to build a support network for other users
 - Heidi Flegel and Johanna Johnson (Engineering/ BPW)
 - Cristine Klawiter (EDD/ EDC)
 - Christine Koh (Finance, FC)
 - Liz Windsor (Council Office/ CC)

Who was invited to attend?

- Original invite was sent to the “Committee Staff List” group, but is open to anyone who uses Legistar or is involved in the legislative process
- Future meetings may targeted to specific audiences based on topic/ interest

Before we get started....

People have varying levels of expertise and experience with Legistar.

- There are no stupid questions.
- Feel free to ask questions in the chat or email us afterward.
- We might not know the answer/ might not get to it in this meeting, especially if the question is specific to a specific BCC that we do not staff, but we will try to direct you to the right person.

This is our first meeting!

- There is a lot to learn about Legistar. This meeting is just scratching the surface.
- We are hoping to have regular meetings throughout the year (approximately quarterly).
- We welcome any suggestions for training topics, additional volunteers to join our organizing team, or other feedback on how to build up this user community.

Main Topic: Fiscal Notes

Basics of the Legislative Process

1.	Draft Legislation	<ul style="list-style-type: none">• Staff/ Alders draft legislation (resolutions, ordinances) that require Council approval• Responsible agency/ BCC staff enters file in Legistar, including referral path, sponsors, and other details
2.	Common Council (CC) Introduction	<ul style="list-style-type: none">• Legislative File is introduced at Common Council (CC) and referred to BCCs (Boards, Committees, and Commissions)• Referral BCCs are selected by Alder sponsoring the item, with input from staff• Any alder may move to add referrals at the CC introduction meeting; must provide reason• There is no debate or discussion on a file at the introduction meeting
3.	BCC Referral	<ul style="list-style-type: none">• BCCs review proposed legislation and makes recommendation to CC• If a file goes to multiple BCCs, one BCC must be designated as the “lead”; lead BCC responsible for making final recommendation to CC and completing submittal form
4.	Council Adoption	<ul style="list-style-type: none">• Council debates legislation based on BCC referrals• Takes a final vote to approve legislation, place it on file, or other action

What is a fiscal note?

A fiscal note is a summary of the fiscal impact of legislation. [Administrative Procedure Memorandum \(APM\) 1-3](#) and [section 2.05 \(1\)\(b\), Madison General Ordinances](#), require that all **resolutions** and **ordinances*** include an appropriate fiscal note approved by the Finance Director or a designee.

- All resolutions and ordinances must have a fiscal note, even if there is no fiscal impact (e.g. honoring resolutions, approving certified survey maps).
- Resolutions that typically require additional fiscal analysis are ones that authorize contracts, apply for or accept grants, amend the budget, appropriate funds, or transfer budget. The Finance Dept. budget analyst will work with agency staff to ensure there is sufficient budget authority for the requested action.
- Fiscal notes must be approved by the Finance Director or Designee (budget staff). Agency staff can enter a draft fiscal note when submitting a file, but Finance Dept. staff have the final approval authority.

*Other types of Legistar files (e.g. presentations, reports) do **not** require a fiscal note and should not go through the Legistar approval workflow.

Legistar approval workflow

- Legistar Demo
- Key Reminders:
 - Staff entering the resolution are responsible for starting the approval sequence for resolutions and ordinances
 - To start the workflow, go to “Approval Tracking” → select budget analyst → click “Start”
 - Once started, the workflow can be paused. Failure to push “Start” button can result in a file not going through the proper sequence.
 - Budget analysts receive an automatic email notice when workflow is started.
 - Analysts look at referral dates in “History” to determine when a file needs to be approved. You do not need to change the default “Due Date.”
 - If you’re not sure who is your budget analyst, check the staff assignments on Employeenet: <https://www.cityofmadison.com/employeenet/finance/budget>

Fiscal Note Timeline

 **UPCOMING COMMON COUNCIL MEETING**
Legistar Reminders and Tips



Legistar Deadlines

Common Council Upcoming Meeting: Tuesday 4/15/25

New Files:

- **Due by Wed, 4/9/25 at noon** – per MGO [2.05\(1\)\(a\)](#)

Deadline to submit new items to Finance for approval is **Wednesday 8:00 am**

➤ **Be sure to complete item submittal for each new file.**

➤ **IMPORTANT: If you miss the Wednesday 8 am Finance deadline, then you must postpone Finance review until after 3 pm Wed. Legistar is unable to pull files that are in ATS Review status onto the initial draft agenda.**

New & returning files due Wednesday prior to CC meeting.

- **8am:** Deadline to submit files to Finance for fiscal note review
- **8am-12pm:** Finance budget analysts review files, draft fiscal notes, and approve file to change status from “ATS Review” to “Items Referred”
- **12pm:** New files due (approved)
- **3pm:** If agency misses the 8am deadline, they still must enter their file by 12pm and wait to start the ATS review until after 3pm

Legislative Timeline Example – April / May

Monday	Tuesday	Wednesday	Thursday	Friday
APRIL 7	8	9 <ul style="list-style-type: none"> 8am: Files that require Finance approval due 12pm: All new files due (approved) AND actions for returning files complete 	10	11
14	15 <ul style="list-style-type: none"> CC Meeting introducing new files and adopting files introduced at prior meeting 	16 <ul style="list-style-type: none"> BCC Meetings (BPW) 	17	18
21	22 <ul style="list-style-type: none"> BCC Meetings (WUB) 	23 <ul style="list-style-type: none"> BCC Meetings (TC) 	24	25
28 <ul style="list-style-type: none"> BCC Meetings (FC, PC) 	29	30 <ul style="list-style-type: none"> 8am: Files that require Finance approval due 12pm: All new files due (approved) AND actions for returning files complete 	MAY 1	2
5	6 <ul style="list-style-type: none"> CC Meeting introducing new files and adopting files introduced at prior meeting 	7	8	9

ATS Review & Fiscal Note Pending Status

- “ATS Review”
 - When a file is in “ATS Review” status, it does not appear on the public-facing Legistar site (<https://madison.legistar.com/>) and cannot be added to an agenda
 - This is why late files should hold on starting the workflow until after 3pm on Wednesday, so the agenda can be generated.
- “Fiscal Note Pending”
 - Finance Dept. goal is to have all fiscal notes complete by Wednesday at 12pm
 - If we have high volume of fiscal notes, need additional time to verify information, or file is submitted late, we may enter “Fiscal Note Pending” to get it through the approval process.
 - If an agency enters a draft fiscal note, budget analyst may replace the text with “Fiscal Note Pending” until they can verify the information. This is because we do not want to publish the file with an unverified fiscal note. We will make a copy of the original text in a separate file while we do our review.
 - If we cannot complete the fiscal note by the Wednesday deadline, we aim to have it entered by the first BCC date at the latest.

Fiscal Note Stats: January – April 2025

201

Total Files (excluding files that are introduced at BPW)

131

Files introduced at BPW (different timeline but still requires Finance review)

38

Submitted on Wednesday (due date)

- Includes both on-time files submitted by 8am and late files submitted after 8am
- 19% – about 2 in 10 files – submitted close to or after deadline

28

Submitted after Wednesday

- 14% – more than 1 in 10 files – are late by more than 1 day

Note on Contract Resolutions

- [APM 1-1](#): Establishes contract requirements. Section 1.B. has a checklist of details of what needs to be included in a resolution. Agency is responsible for ensuring these details are included in the **body of the resolution**. Cannot just be in title or fiscal note. Finance will send back resolutions missing this information.
 - ✓ Who: Full legal business name of contractor
 - ✓ What: Short description of purpose / what they are buying / what the services will be.
 - ✓ When: Term (duration) of contract – can be expressed in years, months, or with specific dates – including any optional renewal or extension periods.
 - ✓ How Much: Total price of contract (can be expressed as lump sum, not to exceed, an hourly rate, a maximum amount with a cushion for change orders, or some other pricing structure sufficient for you to understand the total potential cost of the contract.)
 - ✓ Who signs: A statement about who is authorized to sign the contract for the City of Madison
- [Attorney's Office Contract Website](#): Many useful resources, including [sample resolutions](#) and [Tips for Contract Amendments](#).

Updating files after they are approved

- **Substitutes/ Alternates:** Whenever there is a ***substantive change*** and a substitute is needed, you must repeat the Legistar approval workflow for fiscal note/ approval tracking for each version.

Why? We do not receive notification when a file is updated after the initial approval.

- **By Title Only Resolutions:** Start the Legistar approval workflow for fiscal note/ approval tracking once the body of the resolution is entered.

Why? We do not receive notification when a file is updated. Agencies should delay the workflow until after the body is entered so that the budget analyst can review the content of the resolution.

Note on Resolutions that Amend the Budget

- **Title:** Include the phrase “Amend[ing] the Budget” in the title.
Why? Including the language helps flag 15-vote items. This is useful for BCC staff entering minutes and CC/ Clerk staff in preparing the CC agenda/ consent agenda
- **Body:** Resolve clause(s) must specify how the budget is being amended (e.g. transferring funds across projects, accepting a grant). If the resolution appropriates new funds, you must note the revenue source.
Why? Transfers above \$50,000 and appropriating new funds requires council approval.
- **Referrals:** Resolutions that amend the budget should include a Finance Committee referral. This isn’t required by ordinance but is a best practice.
Why? Including an FC referral helps the Finance Dept track amendments and ensure they are entered in Munis. We are also required to submit a report of budget amendments to our external auditors. Resolutions which amend the budget also require a unique recommendation to Council from the lead referral, as these resolutions require a supermajority to pass (15 votes required).
- **Timing:** You can only amend the budget of the current year.
*Why? The budget is authorized for 1 year. You **cannot** amend the budget of a past or future year.*

Legistar Tips: Referrals and Agendas

How do I know what's going to my BCC?

(Liz Windsor)

- Check the Common Council Agenda for new items referred to your BCC
- Check the Consent Agenda file for items introduced from the floor

How do I notify others that items are referred to their BCC?

(Cristine Klawiter)

- EDD has email templates for notifying agency staff and BCC contacts about upcoming referrals
- Send email to the BCC inbox, **not** the personal email of BCC staff (for example, financecommittee@cityofmadison.com). If you don't know the email address, check the BCC agenda for contact info.



City of Madison

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Agenda - Approved FINANCE COMMITTEE

*Consider: Who benefits? Who is burdened?
Who does not have a voice at the table?
How can policymakers mitigate unintended consequences?*

Monday, January 6, 2025

4:30 PM

VIRTUAL

NOTE: A quorum of the Common Council may be present at this meeting.

The City of Madison is holding the Finance Committee meeting virtually to help protect our community from the Coronavirus (COVID-19) pandemic.

1. Written Comments: You can send comments on agenda items to financecommittee@cityofmadison.com

Questions? Suggestions?

- Let us know what you thought of today's training by completing the Zoom survey
- After the meeting, you can submit other questions on Legistar or suggestions for future training topics here: <https://www.surveymonkey.com/r/2YXFLMG>
- You can also request help by emailing councilagenda@cityofmadison.com. Liz Windsor will monitor this inbox and refer questions to the volunteer team as needed.