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County of San Diego

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To: John Woodard, Executive Assistant, District 1
Dianne Jacob, Executive Assistant, District 2
John Dadian, Executive Assistant, District 3
Jimmie Slack, Executive Assistant, District 4
Nancy Allen, Executive Assistant, District 5

From: Lari Sheehan
Deputy Chief Administrative Officer

GUIDELINES FOR COMMUNICATION BETWEEN BOARD STAFF AND COUNTY STAFF

Our office recently held a workshop dealing with the non-interference prohibition found in County Charter Section 501.9 and Board Policy A-98 on Non-Interference in Administrative Affairs. There was considerable interest by all for continuing discussion on communication protocol. Of particular interest was the desire to understand the proper procedures for referrals and for the flow of information.

The following guidelines are intended to help Board staff discern whom to call for what information as well as when to use the Chief Administrative Officer for requests or for formal referrals. Hopefully these guidelines will also result in obtaining the quickest response by directing inquiries to the proper level and to the correct individual.

The contact lists provided in this package are only for the Project and Permit Processing (PAPP) departments (i.e., DPLU, DPW, and EHS) but the underlying philosophy can be extended generally to all of the County departments.

Communication with County staff generally falls into two main categories:

- Referrals to the CAO Referral System or Requests to a Deputy CAO

- Direct contacts with departments for information

REFERRALS TO THE CAO SYSTEM OR TO A DCAO

When a Supervisor or his/her staff requires information that may involve or be perceived as direction to or interference with County staff, the request should be directed to the CAO.

CAO Referral System

Requests for a report, investigation, response to a citizen complaint etc. should be processed through the CAO Referral System. The CAO will forward it to the proper department(s) for action. The action may include direction to call and discuss the issue with Board staff.

The Board's request and the follow-up report or action will flow through the CAO to provide review and the necessary communication link between the Board and the departments directed by the CAO.

Referrals to a Deputy CAO

When a request involves a project where a DCAO or his/her staff has been personally involved, the request may be directed to the individual DCAO. The DCAO will obtain the information or provide direction to the department on behalf of the CAO.

Additional circumstances where a request should be directed to a DCAO are when information or requests relate to or involve the following:

1. Multi-departmental issues

2. Projects where DCAO has lead and/or projects designated as a major project by the Board. Examples:

    - Water Conservation
    - San Dieguito Regional Park
    - Tijuana and Otay River Regional Park
    - East Otay Mesa
    - Earthquake Preparedness
    - San Luis Rey River
    - Farmworker Housing
    - Otay Ranch
    - Metro Sewer

3. Issues related to matters on an upcoming agenda

4. Interjurisdictional issues

5. Personnel issues (not related to departmental procedures)

6. Issues where the Board office wants action, something more than informational, e.g. code violation checked on ASAP, review of departmental decisions, etc.

7. Calling meetings with departments or project proponents to discuss projects should go initially through DCAO (who may ask Department to respond directly)

8. Issues which question procedures (Countywide or departmental)

9. Agenda items the Board member is preparing to docket

DIRECT CONTACTS WITH DEPARTMENTS FOR INFORMATION

Attached are three Contact Lists, one from each of the three PAPP departments. These are for Board staff use when making direct calls to departments or for referring the public to call directly to the department. Direct calls by Board staff to the departments should be confined to requesting or sharing information. As a general rule, when contacting staff, the exchange of information should be limited to that which would be provided to any member of the general public and should not require research or a report. The level of staff called may depend on the type or extent of the information required. Examples of inquiries and the appropriate staff level are as follows:

Level of Staff	Type of Information Requested
Director, Assistant Director, or in the case of Environmental Health, Chief	Department Policies Regional Issues-- e.g., growth management, waste stream control Unresolved public inquiry
Deputy	Work Program Processing Question Departmental Procedures Board Letters-- e.g., clarification on a letter Unresolved public inquiry
Department Staff	Project related-- e.g., status of TPM 4964 approval, timelines on landfill site search Technical question-- e.g., when the Coastal Commission review is required Operational activity-- e.g., when road maintenance is scheduled, when trees will be trimmed Public Inquiry-- e.g., code violation, abandoned vehicles, counter hours

Please remember that the Board has established a policy (A-72) of an 8 hour limit on requests from an individual Board office. This policy also applies when the request is processed through the CAO.

In the next few months, I invite you to use the preceding guidelines and the attached Contact Lists. Please provide me with any comments you may have, including any suggestions for recommended changes. We appreciate your willingness to work with us to make our communications as efficient and as effective as possible.

Lari Sheehan

LARI SHEEHAN
Deputy Chief Administrative Officer

Attachments