

# Checklist

## Council Agenda Preparation

San Luis Obispo, California (42,000 population), developed a guide to help its staff prepare quality agenda reports. The *Manual for Preparing Council Agenda Reports* establishes a format and level of consistency for report preparation that makes reviewing the reports easier for councilmembers. The manual provides guidelines in two categories: agenda report content and agenda preparation process. It also discusses the use of electronic agendas and template directories. Sample forms and templates are included in the manual, along with examples of prepared documents. Here is the agenda report preparation checklist that is included in the manual:

- Proofread thoroughly for any grammatical and typographical errors.
- Check recommendation line for explicit and accurate recommendation that is consistent with formats outlined in the agenda preparation instructions. If a resolution is to be adopted or an ordinance introduced or given final passage, please specify.
- If the report is more than five pages, excluding attachments, include a Report-in-Brief section.
- When there are alternatives to the recommendation, discuss the advantages and disadvantages along with an explanation as to why the alternative is not recommended.
- Check that all attachments are legible for copying.
- Reduce legal-size documents to letter size.
- Be sure that all attachments have been listed at the end of the agenda report and that all attachments are in the order listed. Draft resolutions and ordinances should be the first attachment after the agenda report if required.
- If an ordinance is being introduced, please include a summary of that ordinance for publication in the *Telegram-Tribune*.
- All documents requiring the mayor's signature must have a signature line for the city clerk to attest and the city attorney to approve as to form.
- The signature lines for the city clerk and mayor's signatures should always appear on the same page and should contain their names (Mayor XXXX XXXX and City Clerk XXXX XXXX).
- A copy of the agenda report and all attachments should be kept in the originating department.
- Even if the item does not include a resolution or ordinance requiring the city attorney's signature, it still must be submitted for his approval before being forwarded to the city administrative officer.
- Do not staple the packet.
- All documents should be one sided, not duplexed.

Source: ICMA *Clearinghouse Report* #42134, October 1996, *Manual for Preparing Council Agenda Reports*, San Luis Obispo, California. To order, contact ICMA's Distribution Center at 1-800/745-8780; fax, 301/206-9789.