

## Engagement Process Results

Recruitment: Director of the Office  
of the Independent Budget Analyst  
City of San Diego

SUBMITTED BY:  
PAM DERBY  
MANAGER, EXECUTIVE RECRUITMENT  
CPS HR Consulting  
2450 Del Paso Rd., Ste. 220  
Sacramento, CA 95834  
P: 916-471-3126  
pderby@cps hr.us  
[www.cps hr.us](http://www.cps hr.us)



# **ENGAGEMENT METHODOLOGY**

---

As requested by the San Diego City Council, CPS HR conducted an aggressive engagement process to gather information regarding the Leadership Characteristics, Knowledge and Skills that the public and a myriad of stakeholders would like to see in the City's next Director of the Office of the Independent Budget Analyst. Engagement opportunities were offered in the form of Council meeting public comment, personal and/or teleconference meetings, an electronic survey and two online public forums.

## **ELECTRONIC SURVEY**

CPS HR deployed an electronic online survey that included five questions regarding ideal candidate attributes. A link to the survey was advertised on the City's website through February 7, 2022. The survey was available in English, Spanish, and Vietnamese. 31 responses were received.

## **ONLINE PUBLIC FORUMS**

Online public forums, sponsored by the City, were held the evening of Wednesday, January 19<sup>th</sup> and the morning of Saturday, February 5<sup>th</sup>. Attendees were broken into small groups to discuss two questions. Facilitators for the groups provided discussion summaries when the groups were brought back together. The following questions were asked:

1. What are the most important skills/abilities essential to the success of the Director of the Office of the Independent Budget Analyst?
2. What are the five most important personal attributes that the Director of the Office of the Independent Budget Analyst should possess to be successful in the City of San Diego?

## **CITY COUNCIL PUBLIC COMMENT**

Informational reports regarding the recruitment process were given during City Council meetings on January 11<sup>th</sup>, January 25<sup>th</sup>, January 31<sup>st</sup> and February 7<sup>th</sup>. Public comment was offered during these informational items.

## **SAN DIEGO STAKEHOLDER INTERVIEWS**

CPS HR conducted telephone interviews with more than 30 stakeholders, including non-governmental organizations, community leaders, and non-profit leaders.

# SUMMARY OF FEEDBACK

---

## Professional Background:

- Familiarity with public budgets, this is a person who needs experience with community engagement and translating information to different levels of stakeholders. They must be able to communicate to stakeholders but also disperse that information to the general public in an easy-to-understand way. How have they collaborated with other departments that don't strictly focus on financial matters? They need to do more than just numbers in this role and need to be comfortable with that. With conversations about race and stereotypes, they need to consider how their hiring process reflects their staff members and the community. So, ensuring they aren't stereotyping who can do what and making sure their choices are diverse.
- It was wonderful to have had Andrea Tevlin in this role for as long as we did. We need someone with the independence, the integrity, and the character of Andrea. They need to have a background in business and fiscal responsibility. Basically, the job description, which was beautiful.
- Someone who has held a similar position and has the educational background of an MBA or public administration. Ideally, someone who has also worked in the private sector, efficiency is missing in government. Unless you have profit and loss experience, it's hard to understand efficiency in the workplace. Someone who is self-motivated and strong and able to say no and not give in. Someone who keeps themselves and their staff accountable.
- This individual needs everything in the brochure. Public sector experience may not be as positive as private sector experience that could provide a fresh perspective. Having an understanding of San Diego and a frame of reference so they can hit the ground running.
- Everything in the brochure, it's critical to have a public service background for this position. They will need that knowledge and political acumen. They should have strong leadership experience as this office requires neutrality and the ability to have difficult conversations.
- They should bring an understanding and appreciation of diversity. San Diego is very diverse; people need to understand the cultural differences. There are differences in Hispanics, Native Americans and other communities. Not having an understanding of those differences can lead to decisions that come across as being narrow. We would like to see an understanding of the setup of tribes. We are sovereign nations and report mainly to the federal government. When we deal with a city, it's a government-to-government relationship. Unless you've lived it, you sometimes don't realize that; as we venture into the cities, we want people to understand that we are doing it as an independent government entity.

- Andrea was amazing; she found terrific staff. I think being in public sector budgeting and having governmental experience in some form (e.g., county, agency, etc.) so they understand it's not a business and you can't run it like a business. Everyone that has been on Andrea's staff has been high-achieving and passionate about public service and have been leaders in their own way while collaborating. Someone who is able to manage a collaborative team and be more of a mentor vs. a boss. Be able to advocate for their team to get more resources and not just for the community.

**Soft Skill Requirements:**

- The last person had a great personality, was even-keeled, able to deal with conflicting opinions, keep the peace and bring people together. Comfortable talking about risk, they don't need to be a huge risk taker but can explain when levels are high, what that means, and why it's a concern. Able to jump out of their framework and respect the diversity of opinions in the room. Transparent when something is either new and innovative or always been done a certain way but could be done a different way. Someone who is in touch with how they come to their opinions and communicate that to others but is open to differing opinions. This job is about respecting the collective vision of others and providing the information to others. Be comfortable advising but know that not everyone will agree with them and knows not to pressure if that occurs. A lot of people may defer to them as the expert in the room, but they shouldn't expect this and know it's their job to educate the Council so they can make informed decisions.
- They need to have a proven track record of independence. Would like to see an article that was written by them or a news clip that showed they can stand up to pressure and scrutiny. Someone that won't go with the flow but go against the grain because this is a beast.
- Possess political acumen and the ability to maintain relationships is a priority. The ability to uphold the balance of negotiating while maintaining good relationships. Someone who isn't afraid of taking risks and has integrity. Know how to convince people to get them on board and not just wait them out. Create a vision and get others to follow that vision.
- Someone who is approachable, honest, and transparent. Someone who can relate to people and talk to them in a way that is understandable in terms of finances and budgets. There is a need to better understand and dissect what's going on.
- Possess quality leadership skills and the ability to navigate hard issues and have those difficult conversations.
- They have to be hands-on and set the example of how to be culturally sensitive. Want them to have a progressive vision of San Diego minority governments. Have to be approachable. Some minority neighborhoods don't always have the political savvy in areas of economics and the IBA should understand the economics of each neighborhood. If they aren't from the area, they need to hit the ground running for the area. They need to go out and walk the streets, shop in the stores. They need to have

the strength to do the right thing even when there is political pressure. Multiple points of view will be pressuring them to be a certain way and they need to be able to stand their ground while being open to new ideas. Have to be able to communicate to both politicians and the common man. Need to be able to talk to the public and make it easy to understand and make them feel comfortable in asking questions. Be open, and if you don't know the answer say you'll get back to us and mean it.

- All the characteristics that were listed in the online survey. They are going to be managing so many people and be pulled in so many directions; they need to be able to be the center of the hurricane; they can see everything swirling around them but manage it and keep everyone moving forward. It can't just be their answer; they need to bring in everyone and investigate all their information and find the shared truth and goal. It's a social science rooted in budget numbers. When working with Andrea, we would say budgets are moral documents, their values are in the document, what you believe in is where you invest. Since we never have enough money for what everyone wants the IBA has to bring forward information for the decision-makers to act on. You have to be compassionate but unbiased in the information you put forward. Sometimes IBA will be seen as the enemy, so someone who can be compassionate and understand that they are in this unique position where they want to help but still have that fiduciary responsibility to the city. Need to be able to give the best information to the decision-makers so they can weigh the possibilities. Andrea and her team were great about going out into the community with the council members to support the communities and get their input. Make sure they can partner with people that can get easy-to-understand information out there to the community. They need to know that they can't be everything to everyone and can steer the ship accordingly.

**Priorities:**

- Would like to see the office have the capacity to take on commonly asked questions about the budget at a detailed level, e.g., if someone wants to know how much money the city spends on paper supplies, the office will see itself as an agency that can answer those questions and make that a priority. We have a council committed to equity, and we would like to see the office of Independent Budget Analyst complete an equity assessment and be able to tell the Council what the impact of their decisions will have on equity. I would like to see the office work more with the Office of Race and Equity. Continue to create documents that explain the budget process to folks and make it more accessible in an app format or using technology to make the records more accessible to other languages and ADA accessible.
- The current administration has developed some wonderful tools. But there's more that could be done to educate the community on what the offices do. There is a wonderful webinar about the budget that could be expanded to show all the processes of the IBA. If you booked an appointment with Andrea's team, the team showed up no matter where you were; love that! This team was accessible, and the next Director needs to

ensure that continues and maybe take it to the next level. Maybe create office hours that aren't 9-5 so working community members can book a zoom meeting and ask their questions—also, educate the public on frequently asked questions or items coming up so that meetings flow quicker because everyone has already been able to speak to the office about their specific questions.

- Being efficient and breaking down the bureaucracies that exist in government, challenging the old way of doing things, and asking why. Being innovative and trying new things, having a growth mindset, and instilling that in the other departments.
- Would like to see audits translated in a way that's meaningful to community members, making it easier to understand for those that live in the city.
- Would like to see someone who is representative of the city that we live in, continuing with the diverse initiatives, and is representative of the demographics of the city.
- Ensure that it's an approachable office, budgets are stressful, so make sure it's not a scary person to approach. It's ok to say no, but you need to say why and explain the reasoning to ensure that the person understands their cause still matters. Keep community stakeholders informed when something changes and let them know why. Treat every stakeholder as a CEO. Meet with the tribe when they come into the office so they can understand the unique ways of the tribe. Would like to see the budget ensure there are cultural monitoring pre-assessments to ensure that archeological and cultural monitoring occurs. In San Diego, if you dig down, you will find something so when developing the budgets, making sure there is money set aside for the cultural side of things, e.g., monitoring or reburying remains. When this person is hired, they should invite the tribes to see what their concerns are, our businesses are moving in and we are all related. Once there is trust, we will help generate revenue. There are American Indian law books that explain what tax laws we are exempt from on or off the reservation; they should understand that.
- When you are on the council floor, you are drinking from a fire hose and don't have time to research how other cities are dealing with issues and what are best practices. The IBA office did a great benchmarking study for library resources to bring best practice ideas forward. That would be helpful if the office were able to do more work such as this. Maybe bringing this to the mayor and council for a branch that could expand this. The IBA's office will be asked to look at spending decisions in terms of equity and housing and see if it makes sense. We are coming out of a financial hole and want to spend more but we need to have someone dedicated to looking at best practices in other cities and whether it's a wise decision to make. The IBA should be forward-looking and look at what other agencies have done in an aspirational sense, not allowing people (auditors) to shut down an idea based on a past mistake. The expertise of the staff, they are so smart and diverse in their experience and want to make a difference, so adding more policy benchmarking will allow them to make more of an impact. Our city is becoming siloed in its thought process, so this will allow better resource sharing.

Continue to support initiatives such as the community budget alliance/citizen's guide and teach communities how to interpret the budget and advocate for what they need.

# ON-LINE PUBLIC FORUMS

---

## **1. What are the most important skills/abilities essential to the success of the Director of the Office of the Independent Budget Analyst?**

- Teach to the people and compile reports that are easily readable for everyday people without diluting the data.
- Appreciate the city is engaging the community. Be a good listener in order to engage with the community.
- Be a good communicator.
- Be able to put out reports that are in different languages.
- Be accountability to act on the behalf of the people.
- Truly independent from politics.
- Not everyone has the internet, find ways to communicate directly with the community.
- Better translation with the budget for non-English speakers.
- Personal outreach and not just direct the community to websites.
- Accessible to the community
- Ability to break down heavy topics
- Provides Webinars / and Budget 101
- Relies on reports/ analysis /council member memos
- Conducts independent analysis
- Conducts community outreach
- Proactive
- Analyzes budget with a social justice/equity lens
- Background of collaborative and inclusivity. Strong relationships with the public.
- Familiarity with all communities in San Diego.
- Willing to work with the community and be transparent.
- Outreach to Latino population to maximize participation. Often overlooked.
- Bring a long-term vision,
- Believe in participatory budgeting

## **2. What are the five most important personal attributes that the Director of the Office of the Independent Budget Analyst should possess to be successful in the City of San Diego?**

- Cultural competency and awareness.
- Excellent listener and with “thick skin”.
- Good speaker, articulate, honest, trustworthy,
- Transparent, accountable, effective.
- Be accessible and engage with the community. Be a good communicator.
- Independent thinker
- Not easily swayed
- Able to answer to a strong mayor



- Robust community engagement
- Competent meeting facilitator
- Provides accessible content
- Includes historically excluded
- Budget equity experience
- Not afraid to point out inconsistencies across reports
- Hold electeds accountable

## **ON-LINE SURVEY**

---

31 total responses were received. Information is provided as raw data and has not been edited or redacted.

## Q1 What are the three most significant challenges/opportunities facing the City that will require the immediate attention of the next Director of the Office of the Independent Budget Analyst?

Answered: 28 Skipped: 3

#	RESPONSES	DATE
1	Supporting the houseless population, police reform and alternatives to incarceration, re-building asylum and supporting our border communities	2/7/2022 8:28 PM
2	Homeless/Housing Safety/Police/Firestation Recreation/Parks/Library	2/7/2022 6:53 PM
3	volativity of funding resources, budget deficit, homelessness crisis.	2/5/2022 1:17 PM
4	- Avoid being controlled by particular interest groups (i.e. Builder & Real Estate - Ensure neighborhood and population equity in projects through Budget distribution - Able to explain how budgets will affect policy	2/5/2022 12:02 PM
5	The police budget proportional to other public works, skyrocketing housing costs, improvements to public transit	2/4/2022 3:18 PM
6	Safe nieborhood community policing more senior activity	1/31/2022 2:51 PM
7	101 ash street. a history of corruption in the city dating to the 1880s (for real). getting over the "flip flop and fish taco" mentality that keeps us from joining the ranks of americas *actual* finest cities, not just those that use it as a marketing slogan.	1/29/2022 8:45 PM
8	Retaining police officers, Homelessness and pandemic crisis	1/28/2022 8:43 PM
9	1. Resisting the siren song of developers 2. Remembering that s/he works for the citizens of San Diego, not developers. 3. Providing objective data to the city council	1/28/2022 6:33 PM
10	- Homelessness - Routing funds to underserved communities - Clean energy/ reduction of carbon emissions	1/28/2022 4:34 PM
11	1. Overseeing funding for all the homeless programs; metrics. 2. Coordinating with City Attorney re: Ash Street litigation and outside contracts for legal representation/support. 3. Maintaining strict independence under our strong mayor system.	1/28/2022 1:08 PM
12	An opportunity: Has interest/knowledge in effective altruism. Must understand take proactive steps to address these challenges: -Rising cost of living and it's impacts. Rent, healthcare, utilities, transportation, is too expensive for many San Diegans. Recessions will increase in frequency. Strict restrictions/qualification requirements for programs combined with the above factors create forced dependency on government programs, where people have no option to escape poverty and achieve independence. -Climate change. This will cause flooding on the coast and fire damage in East County. The costs that come with repairs and displaced people must be accounted for. -The city wastes excessive amounts of money with discriminatory practices, and it's important to identify these costs. As an example, a youth homelessness program was unable to be accessed by anyone because the city refused to install a functional doorbell. Estimated door bell cost, 150 dollars. Estimated cost of a program that had no clients, and also had to pay for a temporary doorbell every month: I don't know but it's too many thousands of dollars.	1/27/2022 6:19 PM
13	Economic Prosperity, Affordable Housing and Underserved Community Development.	1/26/2022 2:24 PM
14	Keeping the City Council and Mayor honest; pension deficit; inventorying and paying for infrastructure backlog.	1/26/2022 1:00 PM
15	Allocate funding to get ALLLLLLLLLLLLLL of the homeless in shelters. MORE police monitoring reckless & speeding drivers. STOP the discrimination of disabled people, as in removing bus benches and installing EXPENSIVE, barely used bike lanes, that obliterate the use of Handicapped Parking spaces.	1/26/2022 7:25 AM

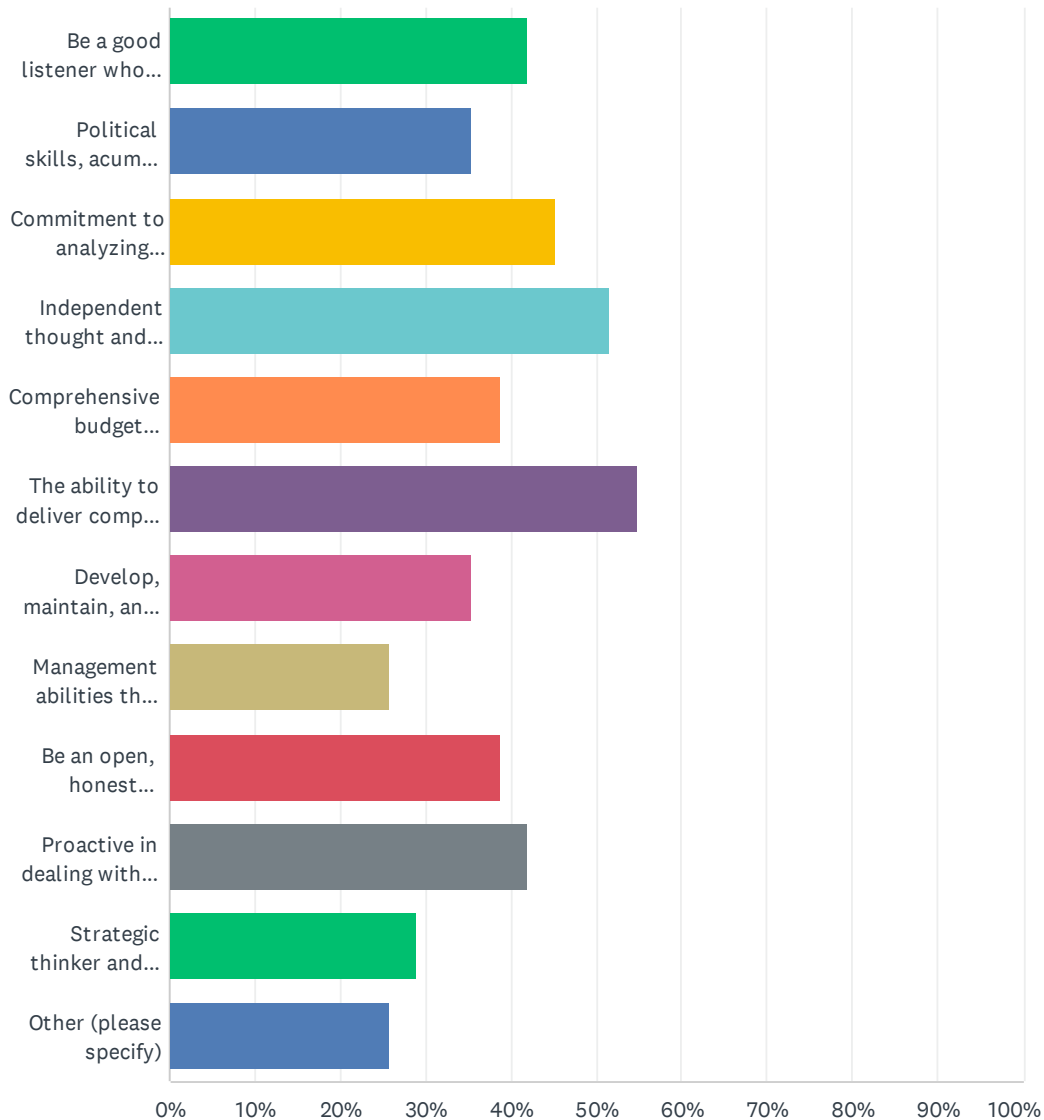
City of San Diego, Director of the Office of the Independent Budget  
Analyst Recruitment Public Survey

SurveyMonkey

16	*Crime *Homelessness *Small Business Support	1/25/2022 9:59 PM
17	1. Creating a sustainable and equitable funding stream that can be prioritized for under-resourced communities and communities of color. 2. San Diego's demographics have changed greatly over the last decade and the City is very geographically diverse and spread out. It will be critical for the City to have a community education and outreach strategy that is robust, meaningful, and culturally appropriate. 3. Decisions within the City must be made via bottom-up process rather than top-down. With staff turnover so high there needs to be a way to retain employees to preserve institutional memory and relationships with the communities served.	1/25/2022 12:04 PM
18	Supporting city workers, transportation, and housing.	1/24/2022 3:15 PM
19	Transparency, Flexibility, and Customer service	1/24/2022 2:17 PM
20	Transparency around the budget (why choices are made I.e. real estate, development, increasing police budget) Providing clarity and opportunity for teachers in the budget (why some schools have money that remain unspent and provide information about how they can access it) Determine where the budget can be best allocated towards environment justice efforts (solar, green, public utilities)	1/22/2022 8:47 AM
21	police budget too high, financing giveaways, account for increase in tax revenue from proposed developments	1/18/2022 4:26 PM
22	Fixing our streets & sidewalks Homelessness Covered bus stops. It's hot out there!! Not fair to people w/disabilities. La Jolla has all covered bus stops. Guess we're 3rd class	1/16/2022 9:30 PM
23	Independence, telling truth to power, bandwidth	1/15/2022 9:35 PM
24	1) Long term fiscal solvency with a view on the pension obligations 2) Planning new infrastructure and building more affordable housing 3) Improving education outcomes and bringing more good-paying entry-level jobs to the region	1/14/2022 8:26 PM
25	1 - Liberals. 2 - Defunding Police. 3 _ Homelessness.	1/14/2022 8:16 PM
26	Homeless street repairs police being respectful of all	1/14/2022 8:13 PM
27	1. Subpar wages for city employees 2. Billions of unfunded storm water infrastructure needs. 3. Billions in deferred maintenance to city infrastructure- whether that's fire stations, roads, other city property.	1/12/2022 2:59 PM
28	Homelessness, Street conditions. Too many regulations	1/11/2022 5:40 PM

## Q2 What are the five most important skills/abilities essential to the success of the Director of the Office of the Independent Budget Analyst (check five boxes):(check five boxes):

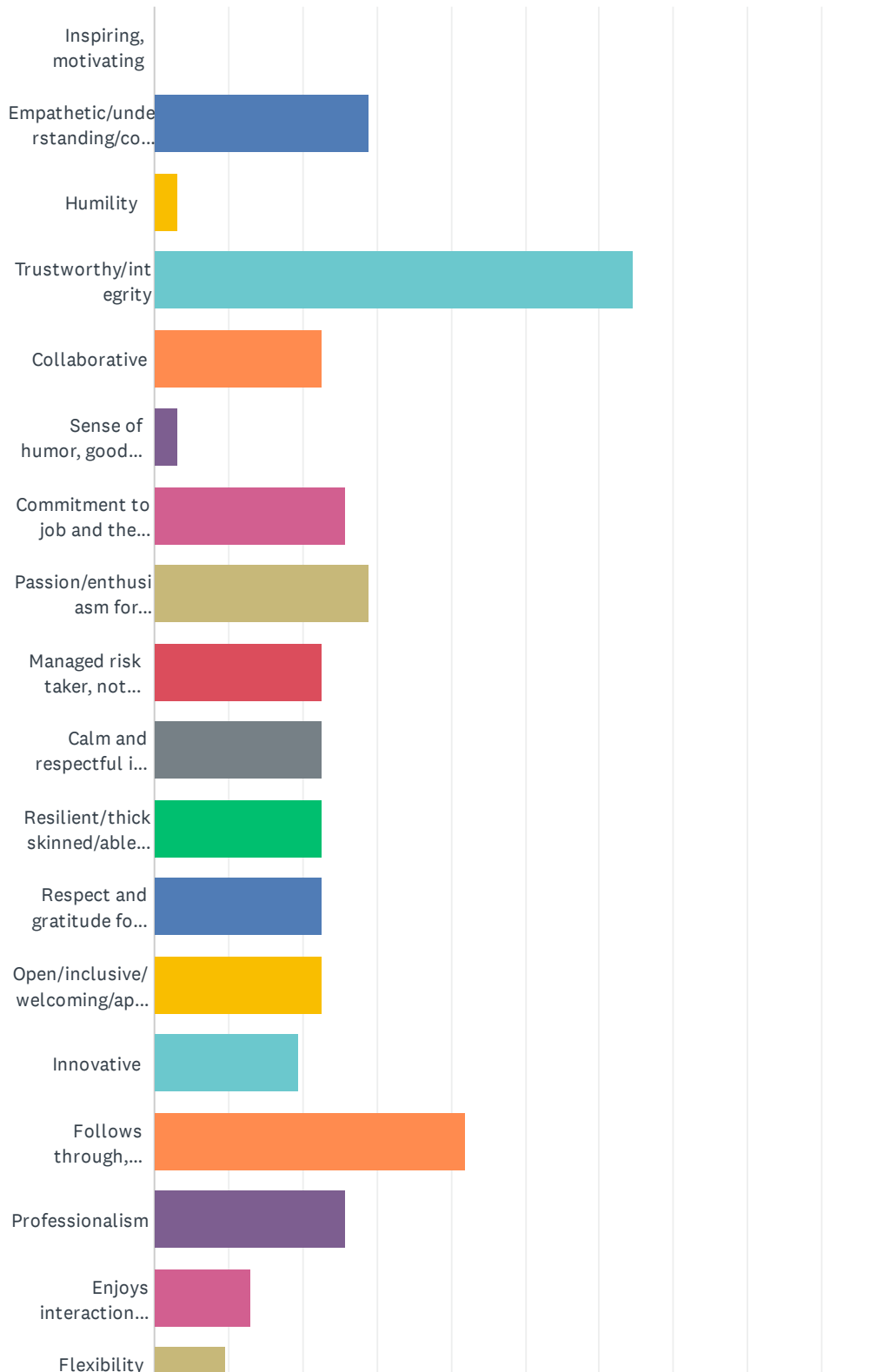
Answered: 31 Skipped: 0

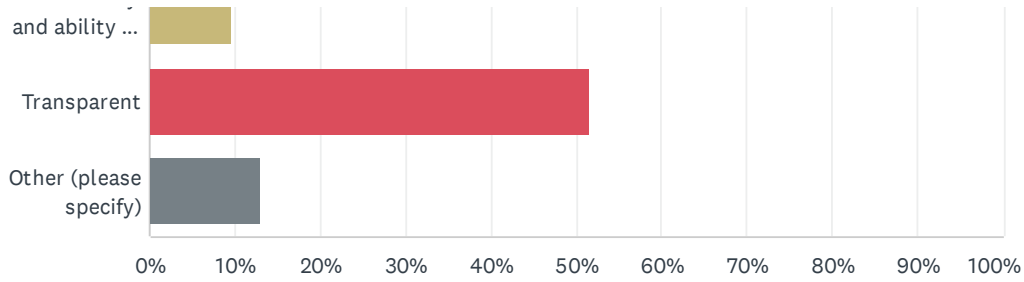


ANSWER CHOICES	RESPONSES	
Be a good listener who knows when to listen, when to add perspective and when to tell the Council, 'no'	41.94%	13
Political skills, acumen, and ability to withstand political heat and serve multiple leaders	35.48%	11
Commitment to analyzing information with a lens focused on equity and sustainability	45.16%	14
Independent thought and ability to challenge staff to think creatively for the future	51.61%	16
Comprehensive budget experience in a similar major U.S. city	38.71%	12
The ability to deliver complex information in an understandable way to any audience	54.84%	17
Develop, maintain, and understand the importance of strong relationships with community organizations and the public	35.48%	11
Management abilities that include making hard decisions, holding self and others accountable	25.81%	8
Be an open, honest communicator willing to be available to the Council, community, and city stakeholders	38.71%	12
Proactive in dealing with problems and able to root out bureaucratic inefficiencies.	41.94%	13
Strategic thinker and able negotiator	29.03%	9
Other (please specify)	25.81%	8
Total Respondents: 31		

### Q3 What are the five most important personal attributes that the Director of the Office of the Independent Budget Analyst should possess to be successful in the City of San Diego? (check five boxes)?

Answered: 31 Skipped: 0



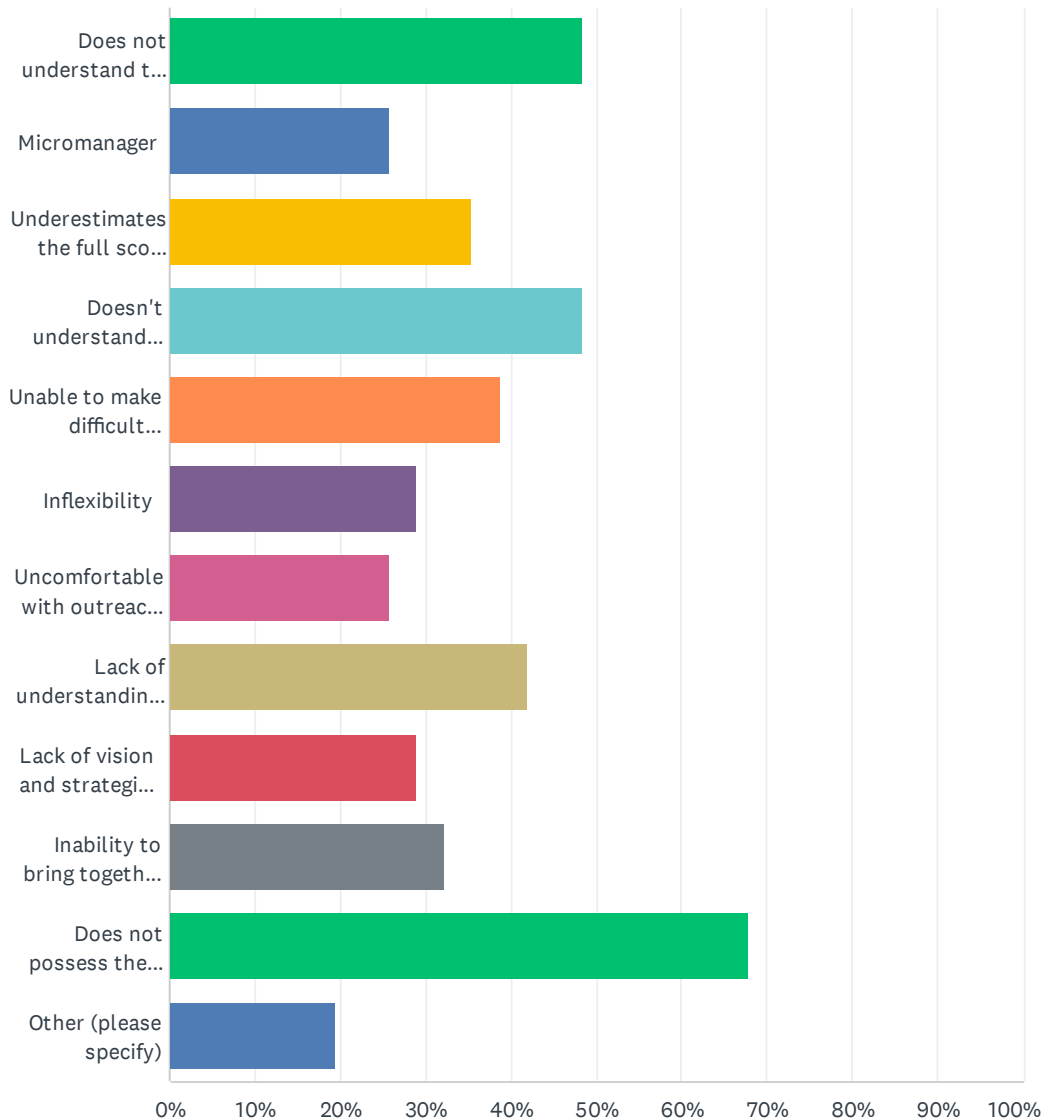


ANSWER CHOICES	RESPONSES	
Inspiring, motivating	0.00%	0
Empathetic/understanding/compassionate	29.03%	9
Humility	3.23%	1
Trustworthy/integrity	64.52%	20
Collaborative	22.58%	7
Sense of humor, good natured	3.23%	1
Commitment to job and the staff	25.81%	8
Passion/enthusiasm for providing the best in public service	29.03%	9
Managed risk taker, not afraid to make mistakes	22.58%	7
Calm and respectful in challenging situations	22.58%	7
Resilient/thick skinned/able to manage sometimes challenging political terrain	22.58%	7
Respect and gratitude for staff	22.58%	7
Open/inclusive/welcoming/approachable	22.58%	7
Innovative	19.35%	6
Follows through, consistent, dependable	41.94%	13
Professionalism	25.81%	8
Enjoys interaction with staff at all levels	12.90%	4
Flexibility and ability to deal with ambiguity	9.68%	3
Transparent	51.61%	16
Other (please specify)	12.90%	4
Total Respondents: 31		



### Q4 What are five characteristics that, if exhibited by the Director of the Office of the Independent Budget Analyst would be most challenging to their success in the position (check five boxes)?

Answered: 31 Skipped: 0



ANSWER CHOICES	RESPONSES	
Does not understand the culture of San Diego and its strategic priorities	48.39%	15
Micromanager	25.81%	8
Underestimates the full scope of the job and commitment required	35.48%	11
Doesn't understand community dynamics	48.39%	15
Unable to make difficult decisions	38.71%	12
Inflexibility	29.03%	9
Uncomfortable with outreach and engagement	25.81%	8
Lack of understanding of diversity, equity and inclusion	41.94%	13
Lack of vision and strategic priorities	29.03%	9
Inability to bring together diverse perspectives toward a common goal	32.26%	10
Does not possess the ability to say 'no' when necessary	67.74%	21
Other (please specify)	19.35%	6
Total Respondents: 31		

## Q5 Other Comments

Answered: 11 Skipped: 20

#	RESPONSES	DATE
1	Thank you for this survey and for doing this important work for San diego!	2/5/2022 1:17 PM
2	This survey is NOT available to residents of San Diego at the City website, making its results invalid and manipulated by community interest groups playing inside politics.	1/28/2022 1:08 PM
3	The survey needed more options that were related to budget analysis job duties. Many of the options were related to interpersonal skills- narcissists and machiavellian types are highly charismatic, and would excel in these areas. They would also destroy the budget and lower the quality of life for many San Diegans. Because of the increase of awareness on social justice issues, a narcissist or machiavellian would easily be able to speak at great lengths about poverty and discrimination while taking blatantly discriminatory and inequitable actions.	1/27/2022 6:19 PM
4	Jeff Kavar, interim IBA director is a person of integrity and supports helping underserved communities	1/26/2022 2:24 PM
5	When is the Ash St. debacle going to be resolved?!? How much more money is going to be wasted on such idiocy?	1/26/2022 7:25 AM
6	A lot of these options are terrible. We're not looking for a best buddy, we're looking for a responsible, professional adult who can make tough decisions.	1/25/2022 9:59 PM
7	Sending community surveys around doesn't fully capture the public's input. I would like to see community forums or a way to engage those who don't have access to the internet.	1/25/2022 12:04 PM
8	Address the issue of trafficking and displacement.	1/21/2022 2:00 PM
9	too much dei here, it does not help, it contradicts in fact	1/18/2022 4:26 PM
10	Please reach out to the public to relay more frequent updates.	1/14/2022 8:26 PM
11	Do not be such a Liberal know nothing who is more interested in feelings than actually improving San Diego.	1/14/2022 8:16 PM