



# AUTHORIZATION OF CITY OFFICIALS AND CONSULTANTS TO EXAMINE CONFIDENTIAL TRANSACTIONS (SALES) AND USE TAX RECORDS

City Council Meeting  
March 16, 2021

Jan Mazyck  
Chief Financial Officer

# CURRENT

- Voters passed Measure Q, an extension of two  $\frac{1}{4}$  cent general transactions and use taxes, on November 3, 2020 by 71.8%
- On December 8, 2020, the City Council adopted Ordinance No. ORD-2020-018 imposing this tax

# CURRENT (cont)

- The CDTFA collects sales tax receipts from businesses as part of the collection of tax revenue
- This information is confidential and State law requires local jurisdictions to identify and authorize those allowed to review the data and send that authorization to the CDTFA
- This is required with each new tax imposed – the last time Santa Rosa did this was with the 2010 sales tax increase

# PROPOSED

- The proposed resolution authorizes the City Manager, Chief Financial Officer, City Attorney, other appropriate City staff, and the City's revenue consultant to examine the confidential sales tax data.
- This data is essential for sales tax revenue trend analysis and forecasting
- There is no cost associated with this item.

# RECOMMENDATION

- It is recommended by the Finance Department that the Council, by resolution, authorize designated City of Santa Rosa officials and the City's revenue enhancement consultant, MuniServices, LLC, to examine confidential transactions (sales) and use tax records of the California Department of Tax and Fee Administration in accordance with the California Revenue and Taxation Code as required by the California Revenue and Taxation Code whenever a city passes a sales tax measure.

# QUESTIONS?