



MEET AND CONFER REVIEW GUIDELINES

Purpose

A Meet and Confer is an opportunity for a successor agency to request additional review by the Department of Finance (Finance) for disputed items on an Annual Recognized Obligation Payment Schedule (ROPS).

A Meet and Confer request may only be for the current Annual ROPS review. Items which are the subject of litigation disputing Finance's previous or related determinations are not eligible.

Additional items ineligible for a Meet and Confer review include the following:

- Previous ROPS
- Amended ROPS
- Last and Final ROPS
- Oversight Board actions

Meet and Confer Request

Agencies must use the Redevelopment Agency Dissolution Application (RAD App) to complete and submit a Meet and Confer Request Form (Form) ([Form DF-MC](#)). No other means of submission will be accepted. The Form must be submitted within five business days of the date of Finance's Annual ROPS determination letter. The date the Form is received by Finance will be considered the filing date.

Each request may address multiple items, as long as they are clearly identified in the "**Summary of Disputed Issue(s)**" section (e.g., disputing contracts or the administrative allowance reported on a ROPS).

In addition, the request must address the following information for each item:

- Identify the form name (e.g., ROPS Detail, Cash Balances, Prior Period Adjustments).
- Identify the item number of the disputed item.
- Explain why the agency believes Finance's determination is incorrect.
 - For example, was an error made related to the facts of the case or was the law applied incorrectly?
 - Be sure to cite the corresponding Health and Safety Code section or other criteria.
- Provide additional information/documents not previously provided to support the agency's position. Do not resend documents that were previously submitted. Reference previously sent documents by the date of the email and document name.

Meet and Confer meetings will take place via conference call. The agency will be provided a contact number upon scheduling of the meeting date and time.

Note: Due to the high-volume of Meet and Confer requests, Finance will not accommodate specific requests for meeting dates and times. The date and time for the Meet and Confer meeting will be determined by Finance – no exceptions will be made.

Meet and Confer Meetings

1. Finance will allot approximately a half an hour to an hour for the meeting, based on the complexity and number of items in dispute.
2. Due to the limited duration of the meeting, please limit the number of attendees to no more than four critical individuals with the greatest understanding of the subject matter.
3. Finance staff in attendance at the meeting may include, but are not limited to:
 - Analysts
 - Management
4. Recording devices will not be allowed during the meeting.
5. The meeting will be facilitated by Finance staff. Generally, the meeting agenda will be as follows:
 - Introductions including sign in/exchange of business cards or contact information.
 - The agency will communicate its position and provide additional information and/or submit documents for review.
 - Open discussion/forum related to item(s) in dispute.

Meet and Confer Determination

1. Upon completion of the meeting, Finance will review all information and documentation submitted in consideration for item(s) in dispute. During the review process, Finance will have sole discretion to request any additional information necessary to conduct a complete and thorough review of the disputed item(s).
2. At the conclusion of our review, Finance will make the final determination related to the disputed item(s) and notify the successor agency of its determination at least 15 days before the date of the first property tax distribution for that period.
3. Until the Meet and Confer review results have been issued, agencies must act in accordance with the initial ROPS determination.