

File No. 250408

Committee Item No. 15

Board Item No. 21

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date May 21, 2025

Board of Supervisors Meeting Date June 3, 2025

Cmte Board

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Motion
<input type="checkbox"/>	<input type="checkbox"/>	Resolution
<input type="checkbox"/>	<input type="checkbox"/>	Ordinance
<input type="checkbox"/>	<input type="checkbox"/>	Legislative Digest
<input type="checkbox"/>	<input type="checkbox"/>	Budget and Legislative Analyst Report
<input type="checkbox"/>	<input type="checkbox"/>	Youth Commission Report
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Introduction Form
<input type="checkbox"/>	<input type="checkbox"/>	Department/Agency Cover Letter and/or Report
<input type="checkbox"/>	<input type="checkbox"/>	MOU
<input type="checkbox"/>	<input type="checkbox"/>	Grant Information Form
<input type="checkbox"/>	<input type="checkbox"/>	Grant Budget
<input type="checkbox"/>	<input type="checkbox"/>	Subcontract Budget
<input type="checkbox"/>	<input type="checkbox"/>	Contract/Agreement
<input type="checkbox"/>	<input type="checkbox"/>	Form 126 – Ethics Commission
<input type="checkbox"/>	<input type="checkbox"/>	Award Letter
<input type="checkbox"/>	<input type="checkbox"/>	Application
<input type="checkbox"/>	<input type="checkbox"/>	Public Correspondence

OTHER (Use back side if additional space is needed)

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<u>COB Presentation 5/21/2025</u>
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Completed by: Brent Jalipa Date May 15, 2025

Completed by: Brent Jalipa Date May 29, 2025

1 [Cost of Living Adjustment - Budget and Legislative Analyst Services - \$3,392,249 - FY2025-
2 2026]

3 **Motion enacting a 4.50% cost of living adjustment (COLA) to the base Fiscal Year (FY)**
4 **2024-2025 contract amount of \$3,246,171 for Budget and Legislative Analyst Services,**
5 **to be effectuated as of July 1, 2025, resulting in a new FY2025-2026 contract amount of**
6 **\$3,392,249 an annual increase of \$146,078 and a new total not to exceed contract**
7 **amount of \$36,000,000 for the contract term ending December 31, 2031; and directing**
8 **the Clerk of the Board to take all necessary administrative action to amend the contract**
9 **accordingly.**

10
11 WHEREAS, A Request for Proposal ("RFP") was issued on April 14, 2021, and the City
12 selected Harvey M. Rose Associates, LLC as the highest qualified scorer pursuant to the
13 RFP; and

14 WHEREAS, The original term of the contract is from January 1, 2022, through
15 December 31, 2025, with one option to renew the contract for an additional period of six
16 years; and

17 WHEREAS, The City exercised one option to renew the contract for a period of six
18 years which extended the contract term to December 31, 2031, which was approved by the
19 Board of Supervisors in Motion No. M24-122, through which the Board of Supervisors directed
20 the Clerk of the Board to take all necessary administrative actions to amend the contract
21 accordingly; and

22 WHEREAS, The contract for Budget and Legislative Analyst Services allows the
23 contractor to request a COLA to their billing rates at least 60 days in advance of each January
24 1st anniversary date of the contract; and

1 WHEREAS, The contract between the City and County of San Francisco and Harvey
2 M. Rose Associates, LLC states that any COLA request shall be no more than the COLA rate
3 agreed between the City and The International Federation of Professional and Technical
4 Engineer Local 21; and

5 WHEREAS, The COLA rate agreed between the City and The International Federation
6 of Professional and Technical Engineer Local 21 is 4.50% for FY 2025-26; and

7 WHEREAS, The Budget Analyst Joint Venture submitted a request for a 4.50% COLA
8 to their contract, to be effectuated as of July 1, 2025; and

9 WHEREAS, The compensation provision of the contract establishes a not to exceed
10 amount of \$3,246,171 per fiscal year beginning in FY 2024-25 unless the Board of
11 Supervisors adopts a Motion enacting a COLA; now, therefore, be it

12 MOVED, That the Board of Supervisors enact a 4.50% COLA to the FY 2024-25 base
13 contract of \$3,246,171 for Budget and Legislative Analyst Services, to be effective on July 1,
14 2025, resulting in a new base contract in FY 2025-26 of not to exceed \$3,392,249, an annual
15 increase of \$146,078, and a total not to exceed amount of \$36,000,000 for the contract term
16 ending December 31, 2031; and directs the Clerk of the Board to take all necessary
17 administrative action to amend the contract accordingly.



Board of Supervisors

Budget & Finance Committee

#13 - Assessment Appeals Filing, Hearing, & Findings Fees

#14 - Legislative Management License & Special Fund

#15 - Budget & Legislative Analyst COLA

May 21, 2025



#13 Assessment Appeals Filing, Hearing, & Finding Fees

The ordinance to update the filing, hearing, and findings of fact fees increases the following

- Application filing fees from \$60 to \$120
- Hearing fees based on assessed value

<i>Where the property affected by the application is valued on the current assessment role at:</i>	<i>Fee</i>
\$250,000 or less	No Charge
\$250,001 - \$2,000,000	\$50.00 <u>\$100</u>
\$2,000,001 - \$10,000,000	100.00 <u>\$200</u>
\$10,000,001 - \$20,000,000	250.00 <u>\$500</u>
\$20,000,001 - \$50,000,000	400.00 <u>\$800</u>
\$50,000,001 - \$100,000,000	600.00 <u>\$1,200</u>
More than \$100,000,000 <u>\$100,000,001 - \$250,000,000</u>	1,200.00 <u>\$2,400</u>
<u>\$250,000,001 - \$500,000,000</u>	<u>\$4,800</u>
<u>\$500,000,001 - \$1,000,000,000</u>	<u>\$9,600</u>
<u>More than \$1,000,000,000</u>	<u>\$19,200</u>

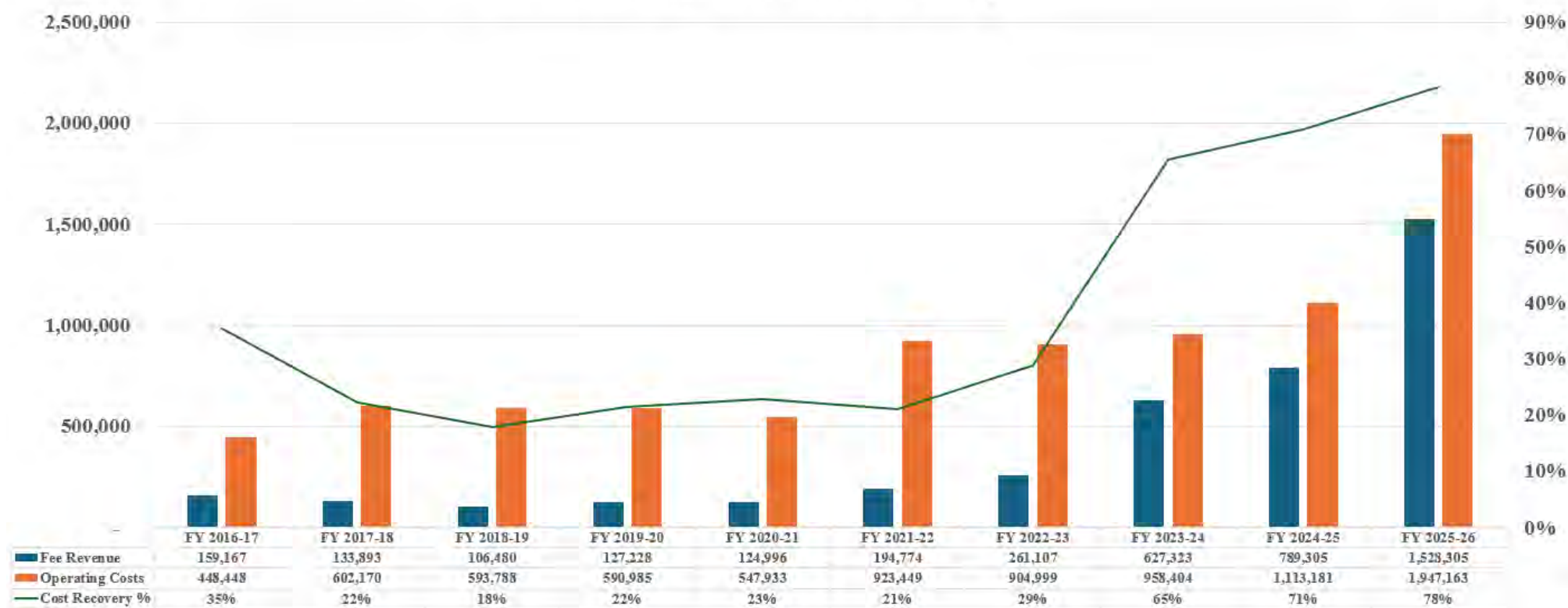
- Finding of fees from \$215 per hour to \$430 per hour



Board of Supervisors – Budget & Finance Committee

#13 - 78% Recovery of Assessment Appeals Board Operating Costs Projected After Fee Update

Assessment Appeals Board Cost Recovery





#14 License & Special Fund for Legislative Management System Licensing Revenue

- Authorizes the Office of the Clerk of the Board to sell licenses to the Legislative Management System (LMS)
- Creates a Category 8 Special Fund for Capturing Revenue from Licensing the LMS to City Boards and Commissions & Other Government Agencies
 - The Category 8 Special Fund ensures that revenue is used to maintain the LMS
- Revenue will be used to pay for maintenance of the new LMS reducing the need to request general fund support to maintain the LMS



Board of Supervisors – Budget & Finance Committee

#15 Budget & Legislative Analyst Services Contract Amendment

- **Current Contractor.** Harvey M. Rose Associates LLC
- **Current Not-To-Exceed Amount.** \$12,849,706
- **Contract Term.** January 1, 2022 to December 31, 2031.
 - Board Approved Motion M24-122 authorized exercising the option to extending the contract by six years to December 31, 2031
- **Cost of Living Adjustment** is 4.50% effective July 1, 2025.
 - The annual increase is for \$146,078 increasing the annual contract amount to \$3,392,249. Total contract amount increases to \$36 million.

<u>Fiscal Year</u>	<u>Calendar Year</u>	<u>Current</u>	<u>Increase</u>	<u>Amended</u>	<u>COLA</u>
FY 2022-23	CY 2022	2,979,318		2,979,318	
FY 2023-24	CY 2023	3,121,318		3,121,318	
FY 2024-25	CY 2024	3,246,171		3,246,171	
FY 2025-26	CY 2025	3,246,171	146,078	3,392,249	4.50%
FY 2026-27	CY 2026	3,392,249	152,651	3,544,900	4.50%
FY 2027-28	CY 2027	3,544,900	124,072	3,668,972	3.50%
FY 2028-29	CY 2028	3,668,972	128,414	3,797,386	3.50%
FY 2029-30	CY 2029	3,797,386	132,909	3,930,294	3.50%
FY 2030-31	CY 2030	3,930,294	137,560	4,067,855	3.50%
FY 2031-32	CY 2031	4,067,855	142,375	4,210,229	3.50%
Total Not-to-Exceed Amount (NTE):				36,000,000	

Introduction Form

(by a Member of the Board of Supervisors or the Mayor)

I hereby submit the following item for introduction (select only one):

- ☒ 1. For reference to Committee (Ordinance, Resolution, Motion or Charter Amendment)
- ☐ 2. Request for next printed agenda (For Adoption Without Committee Reference)
(Routine, non-controversial and/or commendatory matters only)
- ☐ 3. Request for Hearing on a subject matter at Committee
- ☐ 4. Request for Letter beginning with "Supervisor _____ inquiries..."
- ☐ 5. City Attorney Request
- ☐ 6. Call File No. _____ from Committee.
- ☐ 7. Budget and Legislative Analyst Request (attached written Motion)
- ☐ 8. Substitute Legislation File No. _____
- ☐ 9. Reactivate File No. _____
- ☐ 10. Topic submitted for Mayoral Appearance before the Board on _____

The proposed legislation should be forwarded to the following (please check all appropriate boxes):

- ☐ Small Business Commission ☐ Youth Commission ☐ Ethics Commission
- ☐ Planning Commission ☐ Building Inspection Commission ☐ Human Resources Department

General Plan Referral sent to the Planning Department (proposed legislation subject to Charter 4.105 & Admin 2A.53):

- ☐ Yes ☐ No

(Note: For Imperative Agenda items (a Resolution not on the printed agenda), use the Imperative Agenda Form.)

Sponsor(s):

Clerk of the Board

Subject:

Cost of Living Adjustment to the Contract for Budget and Legislative Analyst Services - FY 2025-26

Long Title or text listed:

Motion enacting a 4.50% cost of living adjustment (COLA) to the base FY 2024-2025 contract amount of \$3,246,171 for Budget and Legislative Analyst Services, to be effectuated as of July 1, 2025, resulting in a new FY 2025-2026 contract amount of \$3,392,249, an annual increase of \$146,078, and a new total not-to-exceed contract amount of \$36,000,000 for the contract term; and directing the Clerk of the Board to take all necessary administrative action to amend the contract accordingly.

Signature of Sponsoring Supervisor:

