



1 [Approving the 2014 Budget and Legislative Analyst Services Work Plan]

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3 **Motion approving the Budget and Legislative Analyst services work plan for 2014;**  
4 **allocating hours for calendar year 2014; authorizing the Budget and Legislative Analyst**  
5 **to reallocate up to 20 percent of the hours between service categories based on Board**  
6 **of Supervisors service needs, and requiring Board of Supervisors approval of hours re-**  
7 **allocation greater than 20 percent; establishing performance goals; and setting a date**  
8 **for the 2014 annual performance evaluation of the Budget and Legislative Analyst Joint**  
9 **Venture Partnership.**

10  
11 WHEREAS, The contract between the City and the Budget and Legislative Analyst  
12 Joint Venture Partnership for Budget and Legislative Analyst services to the Board of  
13 Supervisors was effective on January 1, 2014; and

14 WHEREAS, The contract for Budget and Legislative Analyst services defines the scope  
15 of services to include: (1) detailed review of the Annual Appropriation Ordinance and Annual  
16 Salary Ordinance from a financial and policy perspective, or Budget Analysis; (2) evaluation of  
17 legislation pending before the Board and its committees, or Legislative Analysis; (3) policy  
18 analysis and recommendations on legislative initiatives, or Policy Analysis; and (4)  
19 performance and management audits and special projects pertaining to City and County  
20 departments and programs; and

21 WHEREAS, The contract for Budget and Legislative Analyst services requires (1) the  
22 Budget and Legislative Analyst to submit an annual work plan for input, review and approval  
23 by the Board of Supervisors, estimating the allocation of staff hours for each service category  
24 and major project; and (2) the Board of Supervisors to conduct a formal annual performance  
25 evaluation of Budget and Legislative Analyst services with pre-established goals and

1 evaluation criteria so that Board members, or a designated committee, can provide structured  
2 feedback and suggest changes in Budget and Legislative Analyst services to respond to the  
3 Board's changing analytical needs; now, therefore, be it

4       MOVED, That the Board of Supervisors approves the proposed Budget and Legislative  
5 Analyst work plan for calendar year 2014, which (a) allocates hours for Budget Analysis,  
6 Legislative Analysis, Policy Analysis and Performance Audits and Special Projects, (b)  
7 authorizes the Budget and Legislative Analyst to reallocate up to 20 percent of these hours  
8 based on Board of Supervisors service needs, and (c) requires the Board of Supervisors  
9 approval to reallocate greater than 20 percent of these hours; and, be it

10       FURTHER MOVED, That the Board of Supervisors establishes performance goals for  
11 Budget and Legislative Analyst services and sets a date of no later than January 31, 2015, for  
12 the Board of Supervisors to complete the 2014 annual performance evaluation of the Budget  
13 and Legislative Analyst Joint Venture Partnership.

File No. 140147 / 3/27/14 Received in Committee

Service	Description	Estimated Hours Allocation
Budget Analysis	<p>Detailed review of the Annual Appropriation Ordinance and Annual Salary Ordinance from a financial and policy perspective:</p> <ul style="list-style-type: none"> <li>◆ Prepare three-year summary budget projection in coordination with the Controller's Office and the Mayor's Office (Administrative Code Section 3.6).</li> <li>◆ Review the City's long range financial policies and budget compliance with these policies (Proposition A, approved by the voters in November 2009).</li> <li>◆ Evaluate and prepare a report on the impact of the Mayor's proposed budget on City programs and priorities, and conformance to the City's policies.</li> <li>◆ Review, analyze and report on enterprise department budgets in May 2014 and General Fund department budgets in June 2014, as directed by the Board of Supervisors.</li> <li>◆ Attend budget hearings and present results of analyses.</li> <li>◆ Provide any member of the Board of Supervisors who so requests a briefing on our budget analysis and recommendations.</li> </ul>	2,860

Service	Description	Estimated Hours Allocation
Legislative Analysis	<ul style="list-style-type: none"> <li>◆ Review all legislation introduced by the Board of Supervisors for "fiscal impact" determination<sup>1</sup>.</li> <li>◆ Evaluate legislation pending before the Budget and Finance Committee determined to have fiscal impact as defined in the Administrative Code and prepare weekly written analyses of those items.</li> <li>◆ Upon request, provide any member of the Board of Supervisors and the Clerk of the Board a briefing on our weekly Legislative Analysis reports.</li> <li>◆ Submit weekly electronic legislative reports to all members of the Board of Supervisors, the Clerk of the Board, the Controller's Office, the City Attorney and the Mayor's Office in advance of committee meetings.</li> <li>◆ Attend weekly Budget and Finance Committee meetings to present an overview of the legislative reports, findings, and recommendations, and respond to any questions from the Committee.</li> </ul>	8,000

<sup>1</sup> Section 2.6-3 of the Administrative Code requires that the Budget Analyst of the Board of Supervisors review introduced legislation for fiscal impact, defined as an expenditure or commitment of City funds in any fiscal year in excess of \$200,000, or a total expenditure or commitment of City funds in excess of \$1,000,000 over a five year period.

<b>Service</b>	<b>Description</b>	<b>Estimated Hours Allocation</b>
<p><b>Performance Audits and Policy Analysis</b></p>	<ul style="list-style-type: none"> <li>◆ Consult with the Board of Supervisors and Government Audit and Oversight Committee on the annual performance audit plan and draft a motion for the Board of Supervisors to approve the annual performance audit work plan. Assist the Government Audit and Oversight Committee and Board of Supervisors in revising the annual performance audit work plan during the year as requested.</li> <li>◆ Conduct performance audits requested by the Board of Supervisors through approved motions, provide written reports summarizing the findings and recommendations, and brief the requesting Supervisor or other members of the Board of Supervisors as requested.</li> <li>◆ Present performance audit findings and recommendations to the Government Audit and Oversight Committee and respond to Committee questions.</li> <li>◆ Provide policy analysis reports as requested by individual members of the Board of Supervisors. These will cover projects that will require approximately 180 staff hours or less each.</li> <li>◆ Coordinate the Board of Supervisors response to Grand Jury recommendations directed to the Board of Supervisors.</li> <li>◆ Participate in the Public Utilities Commission Revenue Bond Oversight Committee as mandated by Proposition P.</li> </ul>	<p>6,000</p>
<p><b>Total</b></p>		<p><b>16,860</b></p>

**Reporting Requirements**

1. Submit monthly reports to the Clerk of the Board on service hours provided for each of the three service categories.
2. Based on the actual service hours used, the Budget and Legislative Analyst may re-allocate service hours among the three service areas by up to 20 percent of total hours.
3. The Budget and Legislative Analyst must obtain Board of Supervisors approval for re-allocation of hours between service categories that exceed 20 percent of the total hours.

**Attachment II  
Proposed Performance Goals**

Performance Goal	Criteria
<b>Budget Analysis</b>	
Submit final budget analysis reports on time	◆ On time submission of budget analysis reports and recommendations to the Budget and Finance Committee
Budget analysis reports contain useable recommendations	◆ Clearly stated and specific recommendations that can be practically implemented by the appropriate City officials
<b>Legislative Reports</b>	
Provide weekly legislative reports to the Budget and Finance Committee three business days in advance of meetings	◆ Reports provided on time
Provide a weekly briefing on our legislative reports to any member of the Board of Supervisors or the Clerk of the Board as requested	◆ Weekly legislative report briefings provided as requested
On an ongoing basis, identify policy considerations and options for the Board of Supervisors	◆ Policy considerations and options included in legislative reports as appropriate
<b>Performance Audits and Policy Analysis</b>	
Provide recommendations for performance audit topics to the Board of Supervisors	◆ Recommended topics
Submit final performance audit reports consistent within the timeline and budget agreed to by Government Audit and Oversight Committee	◆ Inform Government Audit and Oversight Committee members of status of performance audits ◆ Final performance audit reports provided within the estimated hours and by the expected completion date
Performance audit reports to be clearly presented and to address all audit or project objectives	◆ Clearly presented reports that address audit or project objectives ◆ Clearly stated and specific recommendations in reports that can be practically implemented
Respond to Board member or staff requesting a policy analysis by email within 48 hours, and provide proposed project approach and timeline prior to commencement	◆ Responses provided in a timely manner
Requesting Supervisors to be kept apprised of status of policy analysis projects	◆ Requesting member's office consulted with regarding project status and timeline
Policy analysis reports to be clearly presented and responsive to intent of request	◆ Clearly presented reports that are responsive to intent of request; and recommendations, if requested, that can be practically implemented ◆ Research completed and verbal or written report provided within the agreed timeline



# BOARD OF SUPERVISORS

## BUDGET AND LEGISLATIVE ANALYST

1390 Market Street, Suite 1150 San Francisco, CA 94102 (415) 552-9292  
FAX (415) 252-0461

February 21, 2014

Honorable David Chiu, President,  
and Members of the Board of Supervisors  
City and County of San Francisco  
Room 244, City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

Dear President Chiu and Members of the Board of Supervisors:

The Agreement between the Budget and Legislative Analyst Joint Venture Partnership and the City and County of San Francisco requires that the Budget and Legislative Analyst submit an annual work plan to the Board of Supervisors for input, review and approval. The Budget and Legislative Analyst will work collaboratively with the Board to adjust hours in the annual work plan, as new project and information needs are identified by the Board of Supervisors.

The Agreement also provides for the Board of Supervisors to conduct a formal annual performance evaluation of Budget and Legislative Analyst services with pre-established goals and evaluation criteria so that Board members can provide structured feedback and suggest changes in Budget and Legislative Analyst services to respond to the Board's changing analytical needs.

Attached to this memorandum are the proposed (a) 2014 work plan and service hours' allocation, and (b) 2014 performance goals. The Board of Supervisors may approve, revise, and add to our proposed work plan and performance goals at their discretion.



Severin Campbell, Manager  
Budget and Legislative Analyst's Office

Cc: Supervisor Avalos  
Supervisor Breed  
Supervisor Campos  
Supervisor Cohen  
Supervisor Farrell  
Supervisor Kim  
Supervisor Mar  
Supervisor Tang  
Supervisor Weiner  
Supervisor Yee  
Clerk of the Board

**BOARD OF SUPERVISORS**  
**BUDGET AND LEGISLATIVE ANALYST**

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<p style="text-align: center;"><b>Budget Analysis</b></p>	<p>Detailed review of the Annual Appropriation Ordinance and Annual Salary Ordinance from a financial and policy perspective:</p> <ul style="list-style-type: none"> <li>◆ Prepare three-year summary budget projection in coordination with the Controller's Office and the Mayor's Office (Administrative Code Section 3.6).</li> <li>◆ Review the City's long range financial policies and budget compliance with these policies (Proposition A, approved by the voters in November 2009).</li> <li>◆ Evaluate and prepare a report on the impact of the Mayor's proposed budget on City programs and priorities, and conformance to the City's policies.</li> <li>◆ Review, analyze and report on enterprise department budgets in May 2014 and General Fund department budgets in June 2014, as directed by the Board of Supervisors.</li> <li>◆ Attend budget hearings and present results of analyses.</li> <li>◆ Provide any member of the Board of Supervisors who so requests a briefing on our budget analysis and recommendations.</li> </ul>	<p style="text-align: center;">2,860</p>

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<b>Service</b>	<b>Description</b>	<b>Estimated Hours Allocation</b>
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<b>Total</b>		<b>16,860</b>

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Print Form

# Introduction Form

By a Member of the Board of Supervisors or the Mayor

RECEIVED  
 BOARD OF SUPERVISORS  
 SAN FRANCISCO  
 20 FEB 21 PM 4:13  
 Time stamp  
 or meeting date *SHB*

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

- 1. For reference to Committee.  
     An ordinance, resolution, motion, or charter amendment.
- 2. Request for next printed agenda without reference to Committee.
- 3. Request for hearing on a subject matter at Committee.
- 4. Request for letter beginning "Supervisor [ ] inquires"
- 5. City Attorney request.
- 6. Call File No. [ ] from Committee.
- 7. Budget Analyst request (attach written motion).
- 8. Substitute Legislation File No. [ ]
- 9. Request for Closed Session (attach written motion).
- 10. Board to Sit as A Committee of the Whole.
- 11. Question(s) submitted for Mayoral Appearance before the BOS on [ ]

Please check the appropriate boxes. The proposed legislation should be forwarded to the following:

- Small Business Commission     Youth Commission     Ethics Commission
- Planning Commission     Building Inspection Commission

**Note: For the Imperative Agenda (a resolution not on the printed agenda), use a Imperative**

**Sponsor(s):**

Breed

**Subject:**

Motion setting the 2014 Budget and Legislative Analyst Services Work Plan

**The text is listed below or attached:**

Motion approving the Budget and Legislative Analyst Services work plan for 2014, which (a) allocates hours for calendar year 2014, (b) authorizes the Budget and Legislative Analyst to reallocate up to 20 percent of the hours between service categories based on Board of Supervisors service needs, and (c) requires Board of Supervisors approval of hours re-allocation greater than 20 percent; and establishes performance goals and sets a date for the 2014 annual performance evaluation of the Budget and Legislative Analyst Joint Venture Partnership.

Signature of Sponsoring Supervisor: *[Handwritten Signature]*

For Clerk's Use Only:

140147