

BOARD OF SUPERVISORS

BUDGET AND LEGISLATIVE ANALYST

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February 1, 2013

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 also submit a quarterly report of actual hours used, and will work collaboratively with the Board to shift the emphasis of 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 prior to January 31 of each year 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.

The proposed (a) 2013 work plan and service hours' allocation, and (b) 2013 performance goals are attached to this memorandum. The Board of Supervisors may approve, revise, and add to our proposed work plan and performance goals at their discretion.



Harvey M. Rose

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

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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"> ◆ Prepare three-year summary budget projection in coordination with the Controller's Office and the Mayor's Office (Administrative Code Section 3.6). ◆ Review the City's long range financial policies and budget compliance with these policies (Proposition A, approved by the voters in November 2009). ◆ Conduct analyses of various budget topics, including analysis of continuing projects, limited tenure positions, and encumbered and special fund balances, as directed by the Budget and Finance Committee, in advance of release of the Mayor's proposed FY 2012-13 budget. ◆ Review, analyze and report on enterprise department budgets in May, if necessary, and in General Fund department budgets in June 2013, as directed by the Board of Supervisors. ◆ Attend budget hearings and present results of analyses. ◆ Provide any member of the Board of Supervisors who so requests a briefing on our budget analysis and recommendations. 	2,750

Service	Description	Estimated Hours Allocation
Legislative Analysis	<ul style="list-style-type: none"> ◆ Review all legislation introduced by the Board of Supervisors for “fiscal impact” determination¹. ◆ 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. ◆ Provide any member of the Board of Supervisors who so requests a briefing on our weekly Legislative Analysis reports. ◆ 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. ◆ 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. 	8,650

¹ 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.

Service	Description	Estimated Hours Allocation
Performance Audits, Special Projects and Policy Analysis	<ul style="list-style-type: none"> ◆ Consult with the Board of Supervisors and Government Audit and Oversight Committee on the annual performance audit/special project plan and draft a motion for the Board of Supervisors to approve the annual performance audit/special project work plan. Assist the Government Audit and Oversight Committee and Board of Supervisors in revising the annual performance audit/special project work plan during the year as requested. ◆ Conduct performance audits and special projects as 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. ◆ Present performance audit findings and recommendations to the Government Audit and Oversight Committee and respond to Committee questions. ◆ Provide policy analysis research 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. ◆ Coordinate the Board of Supervisors response to Grand Jury recommendations directed to the Board of Supervisors. ◆ Participate in the Public Utilities Commission Revenue Bond Oversight Committee as mandated by Proposition P. 	5,600
Total		17,000

Reporting Requirements

1. Submit quarterly reports to the Clerk of the Board on service hours provided for each of the four service categories and conduct quarterly reviews and assessments of hours provided to the Clerk of the Board.
2. Provide monthly reports to the Clerk of the Board of Supervisors on the status of each performance audit and special project authorized by a motion of the Board of Supervisors.
3. Based on the quarterly assessments and any requests for analyses by the Board of Supervisors, the Budget and Legislative Analyst may re-allocate service hours among the three service areas by up to 10 percent of total hours.
4. The Budget and Legislative Analyst must obtain Board of Supervisors approval for re-allocation of hours between service categories that exceeds 10 percent of the total hours.

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Performance Goal	Criteria
Legislative Reports	
Provide weekly legislative reports to the Budget and Finance Committee three business days in advance of meetings.	<ul style="list-style-type: none"> ◆ Reports provided timely
Provide a weekly briefing on our legislative reports to any member of the Board of Supervisors who so requests.	<ul style="list-style-type: none"> ◆ Weekly legislative report briefings provided to members of the Board of Supervisors who so requested.
On an ongoing basis, identify policy considerations and options for Board of Supervisors in addition to legislative report recommendations.	<ul style="list-style-type: none"> ◆ Policy considerations and options included in legislative reports as appropriate.
Performance Audits and Special Projects	
Provide recommendations for performance audit and special project topics to the Board of Supervisors.	<ul style="list-style-type: none"> ◆ Recommended topics submitted prior to January 31, 2013.
Submit final performance audit and special project reports consistent with timeline and budget agreed to by Government Audit and Oversight Committee.	<ul style="list-style-type: none"> ◆ Inform Government Audit and Oversight Committee members of status of performance audits and special projects. ◆ Final performance audit and special project reports provided within the estimated hours and by the expected completion date.
Performance audit and special project reports to be clearly presented and to address all audit or project objectives.	<ul style="list-style-type: none"> ◆ Clearly presented reports that address audit or project objectives. ◆ Clearly stated and specific recommendations in performance audit and special project reports that can be practically implemented by appropriate City officials.

Performance Goal	Criteria
Policy Analysis	
Respond to Board member or staff requesting a policy analysis by email within 48 hours receipt by the Budget and Legislative Analyst. Provide proposed project approach and timeline to requesting Board member's office prior to commencement.	<ul style="list-style-type: none"> ◆ Responses provided in a timely manner to requests from individual members of the Board of Supervisors for Policy Analysis projects.
Requesting Supervisors to be kept apprised of status of policy analysis projects.	<ul style="list-style-type: none"> ◆ Requesting member's office consulted with regarding project status and any revisions to timeline.
Policy analysis reports to be clearly presented. Policy analysis reports to be responsive to intent of request.	<ul style="list-style-type: none"> ◆ Clearly presented reports that are responsive to intent of request. Recommendations provided, if requested, that can be practically implemented by appropriate City officials. ◆ Research completed and verbal or written report provided within originally estimated, or revised and approved, timeline.
Budget Analysis	
Submit final budget analysis reports on time.	<ul style="list-style-type: none"> ◆ Budget analysis and recommendation reports for June 2013 Budget and Finance Committee hearings in advance of hearings.
Budget analysis reports contain useable recommendations.	<ul style="list-style-type: none"> ◆ Reports contain clearly stated and specific recommendations that can be practically implemented by the appropriate City officials.