

BOARD OF SUPERVISORS

BUDGET AND LEGISLATIVE ANALYST

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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

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Service	Description	Estimated Hours Allocation
<p style="text-align: center;">Budget Analysis</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"> ◆ 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). ◆ 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. ◆ 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. ◆ 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. 	<p style="text-align: center;">2,860</p>

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. ◆ Upon request, provide any member of the Board of Supervisors and the Clerk of the Board 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. 	8,000

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
<p style="text-align: center;">Performance Audits and Policy Analysis</p>	<ul style="list-style-type: none"> ◆ 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. ◆ 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. ◆ Present performance audit findings and recommendations to the Government Audit and Oversight Committee and respond to Committee questions. ◆ 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. ◆ 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. 	<p>6,000</p>
<p>Total</p>		<p>16,860</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.

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Performance Goal	Criteria
Budget Analysis	
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
Legislative Reports	
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
Performance Audits and Policy Analysis	
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