

Department Budget Submission Checklist

To be completed by: All departments.

Instructions: Submit this completed cover sheet with your budget submission and ensure all applicable forms below are included with your submission.

Department Name: Board of Supervisors

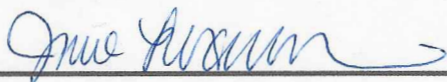
- Summary of Major Changes:** Completed "Form 1A: Summary of Major Changes" explaining major changes submitted in department's budget proposal.
 - Proposed Efficiency/Reduction Savings Loaded in BPMS via Target Reports:** Completed "Form 1B: Target Proposal"
 - Department Budget Summary:** Completed "Form 1C: Department Budget Summary" Submission includes copy of report 15.50.012.
- IDS Detail:** Completed "Form 1D: IDS Detail."
- Revenue Report:** Completed "Form 2A: Revenue Report."
- Fees & Fines:** Completed "Form 2B: Fees & Fines."
- Cost Recovery:** Completed "Form 2C: Cost Recovery." N/A
- Expenditure Changes:** Completed "Form 3A: Expenditure Changes."
- Position Changes:** Completed "Form 3B: Position Changes."
- Layoffs :** Completed "Form 3C: Position Reductions Resulting in Layoffs." N/A
- Contingency Reductions:** Completed "Form 3D: Contingency Reductions."
- Equipment & Fleet Requests:** Completed "Form 4A: New General Fund Equipment"; "Form 4B: N/A
- Minimum Compensation Ordinance:** The effects of the MCO in contracting have been considered as
- Proposition J Description, Summary, City Cost, Contract Cost:** Required for all existing or new Prop Js
- Interdepartmental Services Balancing:** Included Excel download of 15.20.012 3.b.2 IDS balancing repc
- Organizational Charts:** Submission contains updated position-level organizational charts for your department, with indication if the position is filled (F) or vacant (V). Organizational charts also reflect
- New Legislation:**
 - Included draft legislation that department would like to submit with the budget; or,
 - Draft legislation in progress at this time. A description of the proposed changes is included in the "Summary of Major Changes" table. A draft will be provided to the Mayor's Office by
- Other Requests:** Submitted requests for the following items (through separate forms), if applicable:
 - COIT N/A
 - Capital N/A

For Chief Financial Officer/Budget Manager:

I have reviewed the attached budget submission and affirm that all applicable forms checked off above are either included in this submission or have been submitted through the proper online forums.

Full Name: Junko Laxamana

Signature:



**BUDGET FORM 1A: Summary of Major Changes
FY 2021-22 and FY 2022-23**

Board of Supervisors

Major Changes	Department Response to Major Changes	Equity Lens: Explain what populations are benefited by these changes and how they are benefited. How will the department know those were successful?	Equity Lens: Explain what populations are negatively impacted by these changes and how they are impacted. Describe what strategies your Department recommends to mitigate any potential adverse impacts.
1. SUMMARY. What major changes is the department proposing? Clearly describe each change, including the fiscal impact of the proposal, and how the department proposes to fund each significant change (i.e. reprioritization of existing funds, grants, or other new revenues). Include detail related to position changes in Position section below.	See #3 Expenditure Changes and #4 Revenue below.	N/A	N/A
2. TARGET. How did the department meet its target? What are the high-level programmatic, operational, or staffing impacts of this proposed reduction?	Pursuant to the Board Rule 6.8, the department receives budget balancing guidelines from the Board of Supervisor's Budget and Finance Committee in crafting its proposed budget. The Board of Supervisors has been prudent in not growing General Fund appropriation to the department budget and as a result, the department is not able to meet the Mayor's budget target.	N/A	N/A
3. EXPENDITURE CHANGES. What major expenditure changes is the department proposing? Please provide information especially for any grant changes, major contract changes, personnel changes, or other changes that affect core services and functions. What is the overall General Fund impact? Highlight any changes related to major changes/initiatives as noted in the Summary section.	The overall General Fund impact is \$163k in FY 2021-22. - COLA for Budget and Legislative Analyst Services contract - Statutory minimum funding for LAFCo - Additional funding for outreach advertising - Seasonal, temporary staffing fro AAB - Reductions in Salesforce CRM licensing - Cost associated with Redistricting Task Force - Interdepartmental service cost increases proposed by performing depts	Additional funding for outreach advertising will allow the department to place outreach advertisements in all designated outreach newspapers at least once a month. The department advertises vacancies for Boards and Commissions, City programs and services, and other public announcements. African American, Chinese, Hispanic, and LGBTQ communities are served in these neighborhood newspapers.	N/A
4. REVENUE. What revenue changes did the department submit from the base budget? Please differentiate between General Fund and non-General Fund. (This should match an Audit Trail, as shown in form 2A Revenue Report).	<u>General Fund:</u> - Assessment Appeals Board revenue is increased by \$19,000 and \$62,830 in FY 2021-22 and FY 2022-23, respectively, based on the projected increase in assessment appeals. - Expenditure recovery is increased by \$100,000 in FY 2021-22 from Department of Elections for cost associated with Redistricting Task Force.	N/A	N/A
5. LEGISLATION. Is the department seeking to submit any legislation with the budget? Does the department's budget assume any revenues/expenditures that require a legislative change? If so, please submit drafts of legislation along with the budget submission. Or provide a summary of desired legislation and an expected date of submission, if still in progress.	Motion enacting a 3.25% COLA for the Budget and Legislative Analyst Services will be submitted. The department's budget assumes the COLA.	N/A	N/A
6. PROP J. Identify existing Prop J Analyses that will continue, and if the department's budget proposes any NEW contracting out of work previously done by City workers.	Prop J Analyses for the Budget and Legislative Analyst Services will continue. There is no new contracting out of work previously done by City workers.		
7. TRANSFER OF FUNCTION. Is the department requesting any Transfer of Functions of positions between departments? If so, please explain.	No.		
8. INTERIM EXCEPTIONS. Is the department requesting any interim exceptions (new positions that are 1.0 FTE rather than 0.77)? If so, for what reason are is the request being made?	No.		
9. FELLOWSHIP PROGRAMS. Did the department apply to any citywide fellowship programs, including San Francisco Fellows, the Fish Fellowship, or the 1249 HR Analyst Trainee Program?	No.	N/A	N/A
10. BUDGET EQUITY. How will your department support advancing racial equity through its services to the community and within your organization, including the goals and actions identified in the Racial Equity Action Plan?	As the legislative branch of government, the Board of Supervisors has had long-standing history of introducing legislation to advance equity for the City and its constituents. The Board is committed to ensuring that legislation is reviewed through a racial equity lens, and invites the Office on Racial Equity as a collaborative partner to define and provide metrics of potential harm and identify current and effective legislation that may present opportunities for reconciliation. The Office of the Clerk of the Board has continuously developed proactive strategies to ensure that we account for racial and socioeconomic disparities in the consideration of access to the legislative process. Internally, the department continues to work closely with the Department of Human Resources, Civil Service Commission, and Office on Racial Equity to ensure an inclusive and diverse workforce.		

Select a Report
 15.40.001 GFS Target & Non GFS Balance - Dept Detail
 CY

Budget Year
 2022
 2021

Snapshot
 Current
 Phase CY

Department
 BOS
 2020-2021

Phase BY 2021-2022

Phase BY+1 2022-2023

BY+1 2023

Department: BOS Board of Supervisors (General Fund Supported)

Account Lvl 2 Code	Category	BY General Fund Supported			BY+1 General Fund Supported		
		BY Base	BY DEPT + MYR Changes	BY MYR Proposed Amt	BY+1 Base	BY+1 DEPT + MYR Changes	BY+1 MYR Proposed Amt
EXPENDITURE	Mandatory Fringe Benefits	4,623,905	58,891	4,682,796	4,636,011	58,757	4,694,768
	Materials & Supplies	96,916	0	96,916	96,916	0	96,916
	Non-Personnel Services	3,784,104	(56,801)	3,727,303	3,784,104	(83,659)	3,700,445
	Salaries	10,448,714	161,258	10,609,972	10,919,851	168,250	11,088,101
	Services Of Other Depts	373,818	0	373,818	373,818	829	374,647
		19,327,457	163,348	19,490,805	19,810,700	144,177	19,954,877
REVENUE	Charges for Services	200,310	19,000	219,310	200,310	62,830	263,140
	Expenditure Recovery	161,996	100,000	261,996	161,996	0	161,996
		362,306	119,000	481,306	362,306	62,830	425,136

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General Fund Support - BY Target vs Mayor Proposed

Department	Baseline Target	BY MYR Proposed GFS	Amt Over (Under) Target
Reduction Target	(901,674)	18,063,477	19,009,499
			946,022

General Fund Support - BY+ 1 Target vs Mayor Proposed

BY+1 Department	BY+1 Baseline Target	BY+1 MYR Proposed GFS	BY+1 Amt Over (Under) Target
Reduction Target	(901,674)	18,546,720	19,529,741
			983,021

Department: BOS Board of Supervisors (Non GFS Balance)

Account Lvl 2 Code	Category	BY General Fund Supported			BY+1 General Fund Supported		
		BY Base	BY DEPT + MYR Changes	BY MYR Proposed Amt	BY+1 Base	BY+1 DEPT + MYR Changes	BY+1 MYR Proposed Amt
EXPENDITURE	Non-Personnel Services	18,000	42,765	60,765	18,000	0	18,000
		18,000	42,765	60,765	18,000	0	18,000
REVENUE	Charges for Services	18,000	0	18,000	18,000	0	18,000
	Unappropriated Fund Balance	0	42,765	42,765	0	0	0
		18,000	42,765	60,765	18,000	0	18,000

Non-General Fund Support - Revenue Balance

Revenue Total : 60,765

Expenditure Total : 60,765

Revenue Surplus(Deficit) : 0

Non-General Fund Support - BY +1 Revenue Balance

Revenue Total : 18,000

Expenditure Total : 18,000

Revenue Surplus(Deficit) : 0

Select a Report

15.40.002 GFS Target & Non-GFS Balance - Dept Summary
CY

Budget Year

2022
2021

Snapshot

Current
Phase CY

Department

BOS
2020-2021

Phase BY 2021-2022

Phase BY+1 2022-2023

BY+1

2023

Department: BOS Board of Supervisors

(General Fund Supported)

Account Lvl 2 Code	Category	BY General Fund Supported			BY+1 General Fund Supported		
		BY Base	BY DEPT + MYR Changes	BY MYR Proposed Amt	BY+1 Base	BY+1 DEPT + MYR Changes	BY+1 MYR Proposed Amt
EXPENDITURE	Mandatory Fringe Benefits	4,623,905	58,891	4,682,796	4,636,011	58,757	4,694,768
	Materials & Supplies	96,916	0	96,916	96,916	0	96,916
	Non-Personnel Services	3,784,104	(56,801)	3,727,303	3,784,104	(83,659)	3,700,445
	Salaries	10,448,714	161,258	10,609,972	10,919,851	168,250	11,088,101
	Services Of Other Depts	373,818	0	373,818	373,818	829	374,647
		19,327,457	163,348	19,490,805	19,810,700	144,177	19,954,877
REVENUE	Charges for Services	200,310	19,000	219,310	200,310	62,830	263,140
	Expenditure Recovery	161,996	100,000	261,996	161,996	0	161,996
		362,306	119,000	481,306	362,306	62,830	425,136

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General Fund Support - BY Target vs Mayor Proposed

Department	Baseline Target	BY MYR Proposed GFS	Amt Over (Under) Target
Reduction Target	(901,674)	18,063,477	19,009,499
			946,022

Non-General Fund Support - Revenue Balance

Revenue Total : 60,765

Expenditure Total : 60,765

Revenue Surplus(Deficit) : 0

15.40.002 Target & Non GFS Balance - Dept Summary

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General Fund Support - BY+ 1 Target vs Mayor Proposed

BY+1 Department	BY+1 Baseline Target	BY+1 MYR Proposed GFS	BY+1 Amt Over (Under) Target
Reduction Target	(901,674)	18,546,720	19,529,741
			983,021

Non-General Fund Support - BY +1 Revenue Balance

Revenue Total : 18,000

Expenditure Total : 18,000

Revenue Surplus(Deficit) : 0

Department	BY Non General Fund Supported	BY+1 Non General Fund Supported		
		Revenue Total	Expenditure Total	Revenue Surplus(Deficit)
BOS	BOS Board of Supervisors	18,000	18,000	0

BOS Board of Supervisors

Authorized Positions	2020-2021 Original Budget	2021-2022 Proposed Budget	Change From 2020-2021	2022-2023 Proposed Budget	Change From 2021-2022
Total Authorized	85.95	86.93	0.98	86.92	(0.01)
Non-Operating Positions (cap/other)					
Net Operating Positions	85.95	86.93	0.98	86.92	(0.01)

Sources

Charges for Services	199,795	237,310	37,515	281,140	43,830
Expenditure Recovery	161,996	261,996	100,000	161,996	(100,000)
Unappropriated Fund Balance		42,765	42,765		(42,765)
General Fund Support	18,244,527	19,009,499	764,972	19,529,741	520,242
Sources Total	18,606,318	19,551,570	945,252	19,972,877	421,307

Uses - Operating Expenditures

Salaries	9,888,436	10,609,972	721,536	11,088,101	478,129
Mandatory Fringe Benefits	4,460,225	4,682,796	222,571	4,694,768	11,972
Non-Personnel Services	3,790,404	3,788,068	(2,336)	3,718,445	(69,623)
Materials & Supplies	96,416	96,916	500	96,916	
Services Of Other Depts	370,837	373,818	2,981	374,647	829
Uses Total	18,606,318	19,551,570	945,252	19,972,877	421,307

Uses - Division Description

BOS Assessment Appeals Board	701,348	778,219	76,871	796,737	18,518
BOS Budget & Legis Analysis	2,363,745	2,440,567	76,822	2,440,567	
BOS Clerk Of The Board	4,289,305	4,607,040	317,735	4,684,678	77,638
BOS Local Agency Formation Comm	341,240	341,240		341,240	
BOS Sunshine Ord Task Force	172,373	185,507	13,134	191,740	6,233
BOS Supervisors	10,364,652	10,802,506	437,854	11,107,999	305,493
BOS Youth Commission	373,655	396,491	22,836	409,916	13,425
Uses by Division Total	18,606,318	19,551,570	945,252	19,972,877	421,307

Budget Form 2B: Schedule of Licenses, Permits, Fines & Service Charges
 DEPARTMENT: BOS

Inflation Factor for FY 2021-22 Fee Auto Increase as per Code Section **	1.78%
Inflation Factor for FY 2022-23 Fee Auto Increase as per Code Section **	1.55%

CPI will be updated in January 2021. Call Controller's Budget Office to confirm CPI before submitting.

TABLE 1 - MODIFIED AND NEW FEES

Item	Fee Status	Description	Code Authorization	Auto CPI Adjust Yes/No	Account Code	Account Title	Fund Code	Fund Title	Authority Code	Authority Title	Department Code	Department Title	Project Code	Project Title	Activity Code	Activity Title	Unit Basis (e.g., per sq ft.)	FY 2020-21 Fee	FY 2020-21 Units (Est.)	FY 2020-21 Revenue Proposed	FY 2020-21 Cost Recovery (Est.)	FY 2021-22 Fee **	FY 2021-22 Units (Est.)	FY 2021-22 Revenue Proposed	FY 2021-22 Cost Recovery (Est.)	FY 2022-23 Fee **	FY 2022-23 Units (Est.)	FY 2022-23 Revenue Proposed	FY 2022-23 Cost Recovery (Est.)	Fiscal Year of Last Increase	Fee Prior to Last Increase
1																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
2																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
3																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
4																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
5																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
6																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
7																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
8																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
9																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
10																		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -

TABLE 2 - CONTINUING FEES

Item	Fee Status	Description	Code Authorization	Auto CPI Adjust Yes/No	Account Code	Account Title	Fund Code	Fund Title	Authority Code	Authority Title	Department Code	Department Title	Project Code	Project Title	Activity Code	Activity Title	Unit Basis (e.g., per sq ft.)	FY 2020-21 Fee	FY 2020-21 Units (Est.)	FY 2020-21 Revenue Proposed	FY 2020-21 Cost Recovery (Est.)	FY 2021-22 Fee **	FY 2021-22 Units (Est.)	FY 2021-22 Revenue Proposed	FY 2021-22 Cost Recovery (Est.)	FY 2022-23 Fee **	FY 2022-23 Units (Est.)	FY 2022-23 Revenue Proposed	FY 2022-23 Cost Recovery (Est.)	Fiscal Year of Last Increase	Fee Prior to Last Increase		
11	C	AAB Filing Fee	Admin Code Sec. 2B.9	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Application	\$ 60.00	1,200	\$ 72,000		\$ 60.00	2,300	\$ 138,000		\$ 60.00	33,000	\$ 198,000			FY2010/11	\$ 30.00	
12	C	AAB Hearing Fee	Admin Code Sec. 2B.10	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Hearing	\$0-\$1,200	Variable	\$ 25,000		\$0-\$1,200	Variable	\$ 30,000		\$0-\$1,200	Variable	\$ 20,000					\$ -
13	C	AAB Finding of Fact Fee	Admin Code Sec. 2B.11	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Request	\$0-\$6,450	6	\$ 10,870		\$0-\$6,450	6	\$ 11,310		\$0-\$6,450	3	\$ 5,140				FY2010/11	Sliding Scale
14	C	Planning Appeals Surcharge	Admin Code Sec. 31.22	No	460147	BOS - Planning Appeal Surcharge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 120.00	333	40,000		\$ 120.00	333	40,000		\$ 120.00	333	40,000					\$ -
15	C	Certification of Document	Admin Code Sec. 8.37	Yes	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Document	\$ 2.00		\$ -		\$ 2.03		\$ -		\$ 2.10		\$ -					\$ -
16	C	Copies of audio tape, CD, or USB	Admin Code Sec. 8.37	Yes	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Copy	\$ 1.00		\$ -		\$ 1.02		\$ -		\$ 1.05		\$ -					\$ -
17	C	Photocopies of routine documents produced in multiple copies (i.e. agendas and related materials)	Admin Code Sec. 8.37	Yes	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Copy	\$ 0.01		\$ -		\$ 0.01		\$ -		\$ 0.01		\$ -					\$ -
18	C	Photocopies of documents produced on a one-time basis	Admin Code Sec. 8.37	Yes	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Copy	\$ 0.10		\$ -		\$ 0.10		\$ -		\$ 0.11		\$ -					\$ -
19	C	Appeals Fee: Temporary Use of Streets for Street Fairs	Transportation Code Sec. 6.6	Yes	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 58.00		\$ -		\$ 59.00		\$ -		\$ 60.92		\$ -					\$ -
20	C	Appeals Fee: Temporary Use or Occupancy of Public Streets	Transportation Code Sec. 6.2	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 58.00		\$ -		\$ 58.00		\$ -		\$ 58.00		\$ -					\$ -
21	C	Appeals Fee: Autonomous Delivery Devices on Sidewalks Permits	Public Works Code Sec 794	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 300.00		\$ -		\$ 300.00		\$ -		\$ 300.00		\$ -					\$ -
22	C	Appeals Fee: Major Eriochachment Permits	Public Works Code Sec 786	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 650.00		\$ -		\$ 650.00		\$ -		\$ 650.00		\$ -					\$ -
23	C	Appeals Fee: Review of Municipal Transportation Agency Decisions	Transportation Code, Sec. 10.1 (b)(3)	No	460199	Other General Government Charge	10000	GF Annual Account Ctl	10000	Operating	229018	BOS Clerk of the Board	10003454	BD Clerk of the Board	0001	Clerk of the Board	Appeal	\$ 250.00		\$ -		\$ 250.00		\$ -		\$ 250.00		\$ -					\$ -

Fee Status: C Continuing
 M Modified
 N New
 D Discontinued

Note: ** If Auto CPI adjustment = Yes, FY 2021-22 and FY 2022-23 Fee will be automatically generated based on the inflation factor determined by the Controller.
 If Auto CPI adjustment = No, FY 2021-22 and FY 2022-23 Fee will remain the same as previous year or entered by dept according to Code Authorization.

Please complete all shaded sections in this worksheet, as is required by San Francisco Administrative Code Section 2.15:

Department: Board of Supervisors
Contract: Budget and Legislative Analyst

SEC. 2.15 SUPPLEMENTAL REPORTS REQUIRED

Any officer, department or agency seeking Board approval of a contract for personal services under Charter Section 10.104(15) shall submit a supplemental report to the Board of Supervisors in connection with the contract and the Controller's certification.

The report shall summarize the essential terms of the proposed contract and address the following subjects:

1. The department's basis for proposing the Prop J certification;

Per the Charter Section 2.117, the Board of Supervisors shall appoint and may remove a Budget Analyst and such appointment shall be made solely on the basis of qualifications by education, training and experience for the position to be filled. The Board of Supervisors has appointed Budget Analyst JV through a competitive process based on such qualifications and the cost of services is lower than similar work performed by City employees as shown in the analysis.

2. The impact, if any, the contract will have on the provision of services covered by the contract, including a comparison of specific levels of service, in measurable units where applicable, between the current level of service and those proposed under the contract. For contract renewals, a comparison shall be provided between the level of service in the most recent year the service was provided by City employees and the most recent year the service was provided by the contractor;

The contractor provided 16,860 hours of service in FY 2019-20 and is expected to provide the same number of hours in FY 2020-21. The most recent year the service was provided by City employees was FY 1977-78. The Department is not able to verify the hours of service provided by City employees in FY1977-78 and to provide a meaningful comparison as it is reasonably assumed that the scope of work has substantially changed in 40 years.

3. The department's proposed or, for contract renewals, current oversight and reporting requirements for the services covered by the contract:

Contract is monitored by Deputy Director, Administration & Finance for compliance and reporting requirements.

4. The contractor's proposed or, for contract renewals, current wages and benefits for employees covered under the contract, and the contractor's current labor agreements for employees providing the services covered by the contract:

See attached letter from Harvey M. Rose Associates, LLC, the managing partner of the Budget Analyst JV.

5. The department's proposed or, for contract renewals, current procedures for ensuring the contractor's ongoing compliance with all applicable contracting requirements, including Administrative Code Chapter 12P (the Minimum Compensation Ordinance), Chapter 12Q (the Health Care Accountability Ordinance); and Section 12B.1(b) (the Equal Benefits Ordinance);

As part of a contract amendment each year, the department verifies contractor's 12B compliance in the financial system. Compliance with 12P and 12Q requirements are ensured by verifying the contractor's declaration forms annually.

6. The department's plan for City employees displaced by the contract; and

No City employees are displaced by the contract.

7. A discussion, including timelines and cost estimates, of under what conditions the service could be provided in the future using City employees. (Added by Ord. 105-04, File No. 040594, App. 6/10/2004)

Per the Charter Section 2.117, the Board of Supervisors shall appoint and may remove a Budget Analyst and such appointment shall be made solely on the basis of qualifications by education, training and experience for the position to be filled. As such, the service could be provided in the future using City employees if the Board of Supervisors removes the current Budget Analyst and appoints City employees who meet the above qualifications.

Name and job title of the person completing this questionnaire:

Junko Laxamana, Deputy Director, Administration & Finance

4. The contractor's proposed or, for contract renewals, current wages and benefits for employees covered under the contract, and the contractor's current labor agreements for employees providing the services covered by the contract:

See attached letter from Harvey M. Rose Associates, LLC, the managing partner of the Budget Analyst JV.

5. The department's proposed or, for contract renewals, current procedures for ensuring the contractor's ongoing compliance with all applicable contracting requirements, including Administrative Code Chapter 12P (the Minimum Compensation Ordinance), Chapter 12Q (the Health Care Accountability Ordinance); and Section 12B.1(b) (the Equal Benefits Ordinance);

As part of a contract amendment each year, the department verifies contractor's 12B compliance in the financial system. Compliance with 12P and 12Q requirements are ensured by verifying the contractor's declaration forms annually.

6. The department's plan for City employees displaced by the contract; and

No City employees are displaced by the contract.

7. A discussion, including timelines and cost estimates, of under what conditions the service could be provided in the future using City employees. (Added by Ord. 105-04, File No. 040594, App. 6/10/2004)

Per the Charter Section 2.117, the Board of Supervisors shall appoint and may remove a Budget Analyst and such appointment shall be made solely on the basis of qualifications by education, training and experience for the position to be filled. As such, the service could be provided in the future using City employees if the Board of Supervisors removes the current Budget Analyst and appoints City employees who meet the above qualifications.

Name and job title of the person completing this questionnaire:

Junko Laxamana, Deputy Director, Administration & Finance

PROP J ANALYSIS SUMMARY

Board of Supervisors
Budget and Legislative Analyst

FISCAL YEAR 2021-22

City cost if services are not contracted out

	<i>low range</i>	<i>high range</i>
Total Annual Salary	\$ 1,463,572	\$ 1,797,374
Total Other Pay	\$ -	\$ -
Total Fringe Benefits	\$ 629,819	\$ 718,495
Additional City Costs	\$ 332,356	\$ 332,356
	<hr/>	<hr/>
	\$ 2,425,747	\$ 2,848,225

City cost if services are contracted out

Contract Cost	\$ 2,440,567	\$ 2,440,567
City Contract Monitoring	\$ 15,464	\$ 19,127
	<hr/>	<hr/>
	\$ 2,456,031	\$ 2,459,695

City Savings from Contracting Out, Savings/(Cost)	\$ (30,284)	\$ 388,530
	-1%	14%

Please Fill Out Blue Shaded Areas Only.

Board of Supervisors
 207688 Budget and Legis Analysis
 Budget and Legislative Analyst
 COMPARATIVE COSTS OF CONTRACTING VS. IN-HOUSE SERVICES (1) (2)
 FISCAL YEAR 2021-22

PPE FY22 26.1

ESTIMATED CITY COSTS:

PROJECTED PERSONNEL COSTS

Job Class Title	Class	# of Full Time Equivalent Positions	Bi-Weekly Rate per FTE		Annual Cost	
			Low	High	Low	High
Deputy Director III	0953	1.0	\$ 6,297	\$ 8,037	\$ 164,358	\$ 209,775
Manager III	0931	1.0	5,066	6,467	132,221	168,778
Principal Administrative Analyst	1824	3.0	4,643	5,574	363,537	436,419
Senior Administrative Analyst	1823	4.0	4,010	4,814	418,672	502,608
Performance Analyst III	1830	2.0	4,957	6,485	258,748	338,514
Executive Secretary I	1450	1.0	2,913	3,497	76,036	91,280
Temp	1823	0.5	4,010	4,814	50,000	50,000
0	0.00				\$ -	\$ -
0	0.00				\$ -	\$ -
0	0.00				\$ -	\$ -
Holiday Pay (if applicable)	n/a	n/a				
Night / Shift Differential (if applicable)	n/a	n/a				
Overtime Pay (if applicable)	n/a	n/a				
Other Pay (if applicable)	n/a	n/a				
Total FTE			12.5			
			Total Salary Costs-->		\$ 1,463,572	\$ 1,797,374
			Total of Other Compensation-->		\$ -	\$ -

FRINGE BENEFITS

Job Class	\$ Amount
Benefits per FTE--Job Class #:	
0953	\$ 79,733
0931	\$ 70,315
1824	\$ 59,456
1823	\$ 54,212
1830	\$ 65,003
1450	\$ 43,225
0	0
0	0
0	0
0	0
0	0
0	0
Total Fringe Benefits	Low High \$ 629,819 \$ 718,495

ADDITIONAL CITY COSTS

Operating expenses (materials & supplies, travel & training, membership, copier lease, off-site storage, telephone, etc.)	\$ 65,586	\$ 65,586
Space rental	\$ 215,469	\$ 215,469
Equipment & furniture	\$ 24,827	\$ 24,827
Email & software licenses	\$ 26,474	\$ 26,474
Total Capital & Operating	\$ 332,356	\$ 332,356

COST COMPARISON SUMMARY

ESTIMATED TOTAL CITY COST	\$ 2,425,747	\$ 2,848,225
LESS: ESTIMATED TOTAL CONTRACT COST	\$ 2,456,031	\$ 2,459,695
ESTIMATED SAVINGS	\$ (30,284)	\$ 388,530
% of Savings to City Cost	-1%	14%

Comments/Assumptions:

- FY 1979 would be/was the first year these services are/were contracted out.
- Salary levels reflect proposed salary rates effective July 1, 2021. Costs are represented as annual 12 month costs.
- Variable fringe benefits consist of Social Security, Medicare, employer retirement, employee retirement pick-up and long-term.
- Fixed fringe benefits consist of health and dental rates plus an estimate of dependent coverage.
- Classifications based on current configuration of Budget and Legislative Analyst services
- Full time equivalent (FTE) positions include 11 managers and analyst staff and 1 administrative staff. The staff level of 11 managers and analysts is based on the number of staff required to provide 16,860 hours of services not including paid leaves (legal holidays, vacation, sick, etc.) and other non-productive administrative hours such as training and staff meetings consistent with Association of Local Government Auditors standards.
- Space rental cost is calculated using the Real Estate Division's appraisal review for 1390 Market Street (Fox Plaza)
- Calculations do not include liability for retiree health. Based on the CAFR for year ending June 30, 2017, the City's annual liability for post retirement employee health benefits is \$421 million. If the Budget and Legislative Analyst services were provided by City employees, the annual liability for retiree health benefits would be \$171,992 (equal to 0.04 percent of the City's total annual retiree health liability based on FTE count.)
- Estimated total contract cost includes a 3.25% COLA requested by the contractor. If the COLA is not approved by the Board of Supervisors, the total estimated contract cost would be \$2,363,745 in FY 2021-22.

Salary and Benefits for Each Job Class from Enterprise Planning FTE Cost Report

Complete this with the cost of 1.0 FTE; the actual FTE needs will be calculated in the Personnel and Fringe Benefit costs.

Year (BY, aka FY 21/22)	Job Class Number	Job Class Title	FTE	5010 Salary	5130 Benefits	Total Sal & Ben
FY 21/22	0953	Deputy Director III	1.00	\$ 209,775	\$ 79,733	\$ 289,508
FY 21/22	0931	Manager III	1.00	\$ 168,778	\$ 70,315	\$ 239,093
FY 21/22	1824	Principal Administrative Analyst	1.00	\$ 145,473	\$ 59,456	\$ 204,929
FY 21/22	1823	Senior Administrative Analyst	1.00	\$ 125,652	\$ 54,212	\$ 179,864
FY 21/22	1830	Performance Analyst III	1.00	\$ 169,257	\$ 65,003	\$ 234,260
FY 21/22	1450	Executive Secretary I	1.00	\$ 91,280	\$ 43,225	\$ 134,505
			1.00			\$ -
			1.00			\$ -
			1.00			\$ -
			1.00			\$ -

Please Fill Out Blue Shaded Areas Only.

FISCAL YEAR 2021-22

Contract Cost Details

	Low	High
Estimated Contract Cost	2,440,567	2,440,567
Estimated Monitoring Cost	15,464	19,127

Contract Cost Calculation:

Please show all calculations made to estimate contract cost. Describe assumptions and source of data above, and feel free to enter more rows as needed.

List of all contract components	Number of Units	Notes	Total Cost - low end est	Total Cost - high end est
Principal Analyst @ \$201.35 per hour	4,175		840,628	840,628
Senior Analyst @ \$153.63 per hour	4,723		725,576	725,576
Analyst @ \$109.82 per hour	7,962		874,363	874,363
TOTAL CONTRACT COST	16,860		2,440,567	2,440,567

1. List all assumptions made in calculating contract cost.

Include any private wage rates, population estimates, square footage estimates or other data used in calculating your contract cost. Please insert more lines as needed.

- 1)
- 2)
- 3)
- 4)

2. What is the source of data used to calculate the contract cost?

The contract terms and the COLa request were used to determine the contract costs.

3. What year is your data from?

FY 2021-22

4. If contract cost is based on an RFP and before a contract has been approved, was the RFP for comparable services?

Contract Monitoring Costs:

Does/would contract require monitoring? If yes, fill out the details below. If not, explain why, as this would be unusual.	Yes
--	-----

Salary:

Job Class	Job Class Title	# of FTEs (can be partial; e.g. a half time employee would be 0.5 FTE)	Biweekly Rate		Annual Salary Expense		Benefits per FTE		Annual Benefit Expense		TOTAL EXPENSES	
			Low	High	Low	High	Low	High	Low	High	Low	High
0952	Deputy Director II	0.08	5,066	6,467	\$ 10,578	\$ 13,502	\$ 61,077	\$ 70,315	\$ 4,886	\$ 5,625	\$ 15,464	\$ 19,127
					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL CONTRACT MONITORING COST					\$ 10,578	\$ 13,502	\$ 61,077	\$ 70,315	\$ 4,886	\$ 5,625	\$ 15,464	\$ 19,127



February 5, 2021

Ms. Junko Laxamana,
Deputy Director, Administration and Finance San Francisco Board of Supervisors

Dear Ms. Laxamana:

In accordance with Administrative Code Section 2.15-4, we are submitting information on current wages and benefits for employees covered under the contract with the City for Budget and Legislative Analyst Services. The contract consists of the Budget and Legislative Analyst Joint Venture Partnership, of which Harvey M. Rose Associates, LLC is the partner, and the Local Business Enterprise (LBE) subcontractors: Rodriguez, Perez, Delgado & Company (who has one employee): Rashi Kesarwani (an independent LBE subcontractor), and Karl Beitel (an independent LBE subcontractor).

The summary of employment terms are as follows:

Harvey M. Rose Associates (JVP)

- Salaries: generally corresponding to salaries paid by the City for comparable experience
- Health benefits: full premium for employee and dependents for Kaiser, United Health, or Anthem
- Health waiver: employees who can demonstrate other coverage that meets City requirements are eligible for a payment in lieu of health benefits
- Dental benefits: 80% of expenses up to \$2500 per year
- Retirement: 3% contribution to 401(k) safe harbor account
- Holidays: 13
- Vacation: 4 weeks
- Sick leave: accrued at 8 hours per month

Rodriguez, Perez, Delgado & Company (LBE Subcontractor)

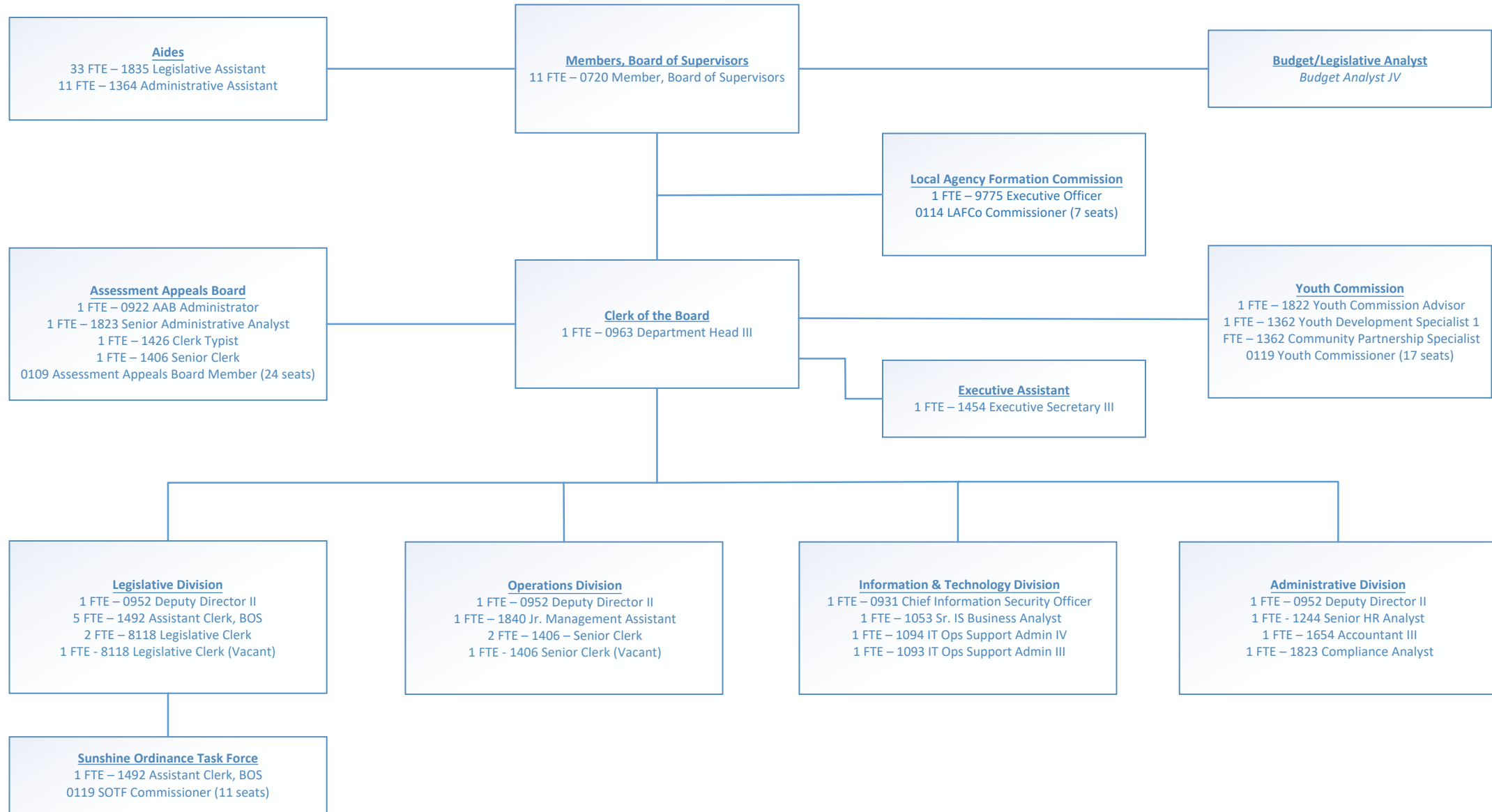
- Salaries: generally corresponding to salaries paid by the City for comparable experience
- Health benefits: full premium for employee and dependents for Kaiser
- Health waiver: employees who can demonstrate other coverage that meets City requirements are eligible for a payment in lieu of health benefits
- Dental benefits: 80% of expenses up to \$2500 per year
- Retirement: eligible after 5 years
- Holidays: 13
- Vacation: 2 weeks
- Sick leave: accrued at 8 hours per month

Severin Campbell, Principal
Harvey M. Rose Associates LLC

Employee	FTE	Annual Salary	Health Benefits	Dental	Retirement	Vacation Days	Holiday	Sick Leave
<u>Joint Venture</u>								
Harvey M. Rose Associates								
Principal Analyst								
Brousseau, Fred	0.50	\$198,069	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Campbell, Severin	0.75	\$198,069	Health plan waiver - \$6600	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Goncher, Dan	0.50	\$174,498	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Guma, Amanda	0.50	\$140,130	Health plan waiver - \$11,000	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Menard, Nicolas	0.85	\$146,000	Full premium - one dependent	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Rose, Harvey	0.10	\$195/hour						
Senior Analyst								
Bairey, Linden	0.50	\$136,571	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Malamut, Christina	0.50	\$134,668	Full premium - one dependent	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Xuereb, Cody	0.50	\$135,136	Full premium - family	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Analyst								
Lindeblad-Fry, Mary	1.00	\$95,000	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Sarah Flamm	0.65	\$95,000	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Emily Firgens	0.65	\$104,000	Health plan waiver = \$11,000	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
Tam, Karrie	1.00	\$106,812	Full premium employee only	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo
<u>LBE Subcontractor</u>								
Rodriguez, Perez, Delgado								
Analyst								
Reuben Holober	1.00	\$101,843	Health plan waiver - \$6600	80% up to \$2500	After 5 years	2 weeks	13 days	8 hrs/mo
Other LBE								
Senior Analyst								
Beitel, Karl	0.50	\$109/hour						
Kesarwani, Rashi	0.50	\$126/hour						
Total FTE	10.00							
<u>Administrative</u>								
Loeza, Gabriella	n/a	\$96,672	Full premium - family	80% up to \$2500	3% safe harbor	4 weeks	13 days	8 hrs/mo

Employee	FTE	Annual Salary	Health Benefits	Dental	Retirement	Total Compensation
<u>Joint Venture</u>						
Harvey M. Rose Associates						
Principal Analyst						
Brousseau, Fred	0.50	\$198,069	\$16,642	\$5,000	\$5,942	\$225,653
Campbell, Severin	0.75	\$198,069	\$6,600	\$2,500	\$5,942	\$213,111
Goncher, Dan	0.50	\$174,498	\$7,350	\$2,500	\$5,235	\$189,583
Guma, Amanda	0.50	\$140,130	\$11,000	\$5,000	\$4,204	\$160,334
Menard, Nicolas	0.85	\$146,000	\$17,768	\$5,000	\$4,380	\$173,148
Rose, Harvey	0.10	\$195/hour	n/a	n/a	n/a	\$28,080
Senior Analyst						
Bairey, Linden	0.50	\$136,571	\$6,562	\$2,500	\$4,097	\$149,730
Malamut, Christina	0.50	\$134,668	\$14,736	\$5,000	\$4,040	\$158,444
Xuereb, Cody	0.50	\$135,136	\$18,276	\$5,000	\$4,054	\$162,466
Analyst						
Lindeblad-Fry, Mary	1.00	\$95,000	\$6,562	\$2,500	\$2,850	\$106,912
Sarah Flamm	0.65	\$95,000	\$6,562	\$2,500	\$2,850	\$106,912
Emily Firgens	0.65	\$104,000	\$11,000	\$5,000	\$3,120	\$123,120
Tam, Karrie	1.00	\$106,812	\$6,779	\$2,500	\$3,204	\$119,295
<u>LBE Subcontractor</u>						
Rodriguez, Perez, Delgado						
Analyst						
Reuben Holober	1.00	\$101,843	\$6,600	\$2,500	n/a	\$110,943
Other LBE						
Senior Analyst						
Beitel, Karl	0.50	\$109/hour	n/a	n/a	n/a	\$109,000
Kesarwani, Rashi	0.50	\$126/hour	n/a	n/a	n/a	\$126,000
Total FTE	10.00					
<u>Administrative</u>						
Loeza, Gabriella	n/a	\$96,672	\$19,830	\$10,000	\$2,900	\$129,402

Board of Supervisors Organization Chart – FY21-22



1 [Cost of Living Adjustment to the Contract for Budget and Legislative Analyst Services -
2 \$2,440,567 – FY 2021-2022]

3 **Motion enacting a 3.25% cost of living adjustment (COLA) to the base FY 2020-2021**
4 **contract amount of \$2,363,745 for Budget and Legislative Analyst Services, to be**
5 **effectuated as of July 1, 2021, resulting in a new FY 2021-22 contract amount of**
6 **\$2,440,567, an increase of \$76,822; and directing the Clerk of the Board to take all**
7 **necessary administrative action to amend the contract accordingly.**

8
9 WHEREAS, A Request for Proposal (“RFP”) for Budget and Legislative Analyst
10 Services was issued on May 24, 2013, and the City selected Harvey M. Rose Associates,
11 LLC, Debra A. Newman, Louie & Wong, LLP, A Joint Venture, as the highest qualified scorer
12 pursuant to the RFP; and

13 WHEREAS, The Agreement was made on December 19, 2013 between Harvey M.
14 Rose Associates, LLC, Debra A. Newman, Louie & Wong, LLP, A Joint Venture and the City
15 and County of San Francisco; and

16 WHEREAS, The sixth amendment to the contract dated February 8, 2019 amended the
17 agreement to be between Harvey M. Rose Associates, LLC and Debra A. Newman, A Joint
18 Venture and the City and County of San Francisco; and

19 WHEREAS, The eighth amendment to the contract dated November 1, 2019 amended
20 the agreement to be between Budget and Legislative Analyst, Joint Venture, and the City and
21 County of San Francisco; 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 1 anniversary date of the contract; and

25

1 WHEREAS, the Budget and Legislative Analyst Joint Venture submitted a request for a
2 3.25% COLA to their contract, to be effectuated as of July 1, 2021; and

3 WHEREAS, The compensation provision of the contract establishes a not-to-exceed
4 amount of \$2,363,745 per fiscal year beginning in FY 2020-21 unless the Board of
5 Supervisors adopts a motion enacting a COLA; now, therefore, be it

6 MOVED, That the Board of Supervisors enact a 3.25% COLA to the FY 2020-21 base
7 contract of \$2,363,745 for Budget and Legislative Analyst Services, to be effective on July 1,
8 2021, resulting in a new base contract in FY 2021-22 of not to exceed \$2,440,567, an
9 increase of \$76,822; and directs the Clerk of the Board to take all necessary administrative
10 action to amend the contract accordingly.

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