

# Non-Partisan Analysis in a Partisan World

By Elizabeth G. Hill, *Legislative Analyst*

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I got hooked on policy analysis in 1972 when, instead of working my regular summer job at a tomato-processing plant, I interned at the State of California's Department of Transportation. My mentors were dedicated public servants who wanted to deliver high-quality services and were willing to come up with creative solutions to problems. Thirty years later I find myself having spent more than a quarter of a century working for the California legislature as a non-partisan fiscal and policy advisor—convinced more than ever that policy analysis matters and that there are many ways to make a positive difference in the public sector.

It became apparent during my internship days that to do the job I really wanted to do in the field of policy analysis, I needed to develop my analytical and communication skills. Policy schools were springing up across the country and I enrolled in the University of California at Berkeley's Graduate School of Public Policy (GSPP—now the Goldman School). By 1975, when I graduated, most public sector employers were unfamiliar with the Master of Public Policy (MPP) degree, most faculty's public sector experience was at the federal level, and computers were not an integral part of our academic experience.

California's *Legislative Analyst's Office* (LAO) was established in 1941 as the first non-partisan legislative fiscal office in the country. (The Congressional Budget Office was established more than three decades later in the 1970s.) The LAO is charged with analyzing the State of California's budget and making recommendations to the legislature on ways state government can run more efficiently and economically. As an advice giver, the office is charged "to call it as we see it" or as my mentor Aaron Wildavsky, dean of GSPP, might have put it, the office has a mandate to "speak truth to power."

The LAO was willing to take a chance on me and my MPP training. When I joined the office, California had a population of nearly 22 million and a general fund budget of \$10.5 billion. Now, in 2002, the state has a population of 35 million and a general fund budget of \$76.7 billion. Likewise, the range and complexity of the issues we must address have increased as a result of factors such as greater population density and diversity, environmental concerns, and new societal issues such as AIDS.

Not only have our size and the nature of our problems changed, the world of policy analysis itself has changed, too. Granted, the original underlying principles of our work—ensuring that public programs are effective and cost efficient in achieving their objectives—remain our primary focus. However, techniques in vogue then—cost-benefit analysis, systems analysis, planning-programming-budgeting-systems (PPBS), and zero-based budgeting (ZBB)—have either been supplemented by or have given way to such tools as micro-simulation models and multi-equation regression techniques. From limited use of mainframe computers and a reliance on desktop calculators, we have gone to powerful personal computers on each desk. This has given our analytical team the ability to gather, keep, and manipulate much more data than we could before. The MPP degree is now one of the degrees of choice for our office's hiring—with a premium on experienced analysts who can bring their judgment and real-world knowledge to the table.

As I direct our office in its 61st year, it is useful to reflect on changes over the last quarter century and how they have affected the policy world in which we operate.

## Ballot Box Budgeting

California's fiscal relationships with local government changed dramatically in 1978 with the passage of Proposition 13, which reduced local property taxes by more than 50 percent and capped their growth in the future. Legislative actions taken to assist local governments in coping with the

dramatic loss of revenue also made local governments more dependent on the state budget process. In the area of education, for example, the proposition effectively shifted program and funding responsibility from the local level to the state. School boards lost their authority to raise revenue to meet such spending commitments as salary increases for teachers. Proposition 13 was followed in subsequent years by numerous other measures affecting the state budget, including: indexing the personal income tax; eliminating the inheritance tax; establishing a constitutional funding guarantee for schools from kindergarten through the community colleges; establishing state and local government appropriations limits; and earmarking tobacco tax revenues for particular programs. These measures, while protecting various interests, have had the unintended effect of complicating the budget process and making it less understandable to the public. It has become increasingly difficult for citizens to know which entity of government is responsible for a governmental program and its funding.

## **New Client Orientation**

Our client, the California legislature, has also been dramatically affected by a 1990 ballot measure imposing term limits. California's limits are lifetime bans after serving a maximum of 6 years in the State Assembly and 8 years in the State Senate. While term-limited members are dedicated public servants, we have found that they need more basic information about state programs and finances than did their predecessors—and they need it sooner. In addition, when a policy or budget problem is identified, current legislators need more assistance in identifying the actions that can be taken to address it. As a result, my office's knowledge of state programs and the details and intricacies of the state budget are more in demand.

At the same time, because of other factors, the political environment in which we operate has become more partisan. This has had the effect of making it more difficult to find consensus when addressing state budget problems. It has also made it more difficult to have policy discussions because both sides tend to be fixed on their own worldview.

A more partisan environment, however, can increase the importance of our office's role as a neutral third party able to provide decisionmakers with reliable information and advice. This has required establishing a trust relationship as quickly as possible with our clients, knowing that, on average, 33 percent of the legislative members will turn over after each 2-year election cycle.

As legislators grapple with issues involving federal, state, and local governments, we have found it increasingly important to offer program solutions. A solution-orientation requires extensive program knowledge, political sophistication, and communication skills. It also involves taking more risks. This is because more than one solution may follow from the analysis, and certain solutions may be more acceptable to different constituencies. After offering solution options in a range of policy areas, ranging from welfare reform to health care to transportation funding, we have found that the risks are worth taking and that our analysis has provided an effective starting point for legislative deliberations.

## **Crowded Advice World**

The increasing complexity of government and partisanship of the legislature have resulted in a crowded advice world. Legislators now have personal aides, policy committee consultants, fiscal committee consultants, party caucus staff, and research staff. In addition, many non-legislative policy advice institutions exist with a strong presence in Sacramento: business-supported entities (e.g., California Chamber of Commerce), tax policy groups (e.g., California Tax Reform Association), and education groups (e.g., California Teachers' Association). Given the plethora of sources of advice, not to mention the policy analysis available from academia and national institutions, it is critical for us to be familiar with a broad spectrum of perspectives in the advice world.

## **Think About The M Word**

Given the crowded advice world, we have found that we have had to give increasing attention to the M word—marketing. Not only have we tried to improve the appearance of our products to make them more accessible to the reader—using graphics, color, and professional design—but we have spent more time on improving the coverage and attention our published products receive. As analysts, we tend to react negatively to the notion of marketing, what with its connotations of manipulation and advocacy. We have, however, learned to accept the notion that the world is not going to beat a path to our analytical door. As a result, we make it a priority to market our products through our Web site and contacts with the capitol press corps.

## **Conclusion**

Reflecting back over 25 years of public service, I believe passionately in the power of policy analysis to make things better. Facts, analysis, and advice are powerful forces in public decisionmaking. That said, it is important to recognize the limitations of policy analysis. No basis exists for me, for example, to advise the legislature on the "appropriate" level of progressiveness in the state's income tax or to draw conclusions about comparable redistribution issues. As a nonpartisan advisor, I cannot take a position substituting my philosophical preferences for those of decisionmakers. Despite the limitations, however, I see a bright future for policy analysts who want to make a positive difference in the public sector.

This article represents the view of the author and does not reflect the view of the Legislative Analyst's Office.