Date: August 16, 2010

To: The Honorable Civil Service Commission

Through: Micki Callahan
Human Resources Director

From: Brent Lewis, HRD
Shamica Jackson, PUC

Subject: Personal Services Contracts Approval Request

This report contains three (3) personal services contracts (PSCs) in accordance with the revised Civil Service Commission (CSC) procedures for processing PSCs that became effective on July 1, 1996.

The services proposed by these contracts have been reviewed by Department of Human Resources (DHR) staff to evaluate whether the requesting departments have complied with City policy and procedures regarding PSCs. The proposed PSCs have been posted on the DHR website for seven (7) calendar days. CSC procedures for processing PSCs require that any appeal of these contracts be filed in the office of the CSC, Executive Officer during the posting period.

No timely appeals have been filed regarding the PSCs contained in this report. These proposed PSCs are being submitted to the CSC for ratification/approval.

DHR has prepared the following cost summary for personal services contracts that have been processed through the Department of Human Resources to date:

<table>
<thead>
<tr>
<th>Total of this Report</th>
<th>YTD Expedited Approvals FY 2010-2011</th>
<th>Total for FY 2010-2011</th>
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</thead>
<tbody>
<tr>
<td>$2,789,000</td>
<td>$310,700</td>
<td>$82,467,217</td>
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## PROPOSED PERSONAL SERVICES CONTRACTS
### Regular, Continuing, Annual

<table>
<thead>
<tr>
<th>PSC No</th>
<th>Dept No.</th>
<th>Dept Name</th>
<th>Approval Type</th>
<th>Contract Amount</th>
<th>Description of Work</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>4023-10/11</td>
<td>33</td>
<td>Human Resources</td>
<td>Regular</td>
<td>$150,000</td>
<td>Consultant will work with Airport and Department of Human Resources (&quot;DHR&quot;) staff to improve and expand upon the functionality of DHR’s internal Classification database, and develop a consistent methodology for improving classification decisions. Consultant will work with City staff to redesign and develop a database tool to categorize knowledge, skills, abilities, and corresponding activities and tasks consistent with the principles of industry accepted standards, such as O*NET. This new tool will ensure Citywide consistency within the classification plan and will facilitate appropriate classification selections based on multi-level search criteria that accurately reflect duties and responsibilities of the position. The goal of this service is to create a highly efficient, standardized, front-end, interactive database tool designed to minimize the potential for appointing officers to make classification decisions based solely on desired pay or other preconceived notions that result in inappropriate grade inflation (e.g., making an appointment to a manager classification when an advanced technical level classification would be more appropriate for the duties and the responsibilities of the position), and reduce inconsistencies and perceived subjectivity in classification decisions throughout the City.</td>
<td>12/31/2011</td>
</tr>
<tr>
<td>4024-10/11</td>
<td>40</td>
<td>Public Utilities Commission</td>
<td>Regular</td>
<td>$139,000</td>
<td>Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service base on their respective service requirements and development of schedules of electric rates to recover allocated costs from each retail customer class. Contract deliverables in addition to schedules of rates include the development of cost of service model to permit Hetch Hetchy (HH) staff to annually update the cost of service analysis.</td>
<td>12/31/2012</td>
</tr>
<tr>
<td>4025-10/11</td>
<td>40</td>
<td>Public Utilities Commission</td>
<td>Regular</td>
<td>$2,500,000</td>
<td>Provide municipal financing advisory services to the SFPUC in the structuring and competitive sale of taxable and tax-exempt revenue bonds, taxable and tax-exempt commercial paper, certificates of participation, Clean Renewable Energy Bonds (CREBs), Qualified Energy Conservation Bonds (QECBs), and other forms of municipal financing.</td>
<td>9/15/2017</td>
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</tbody>
</table>
City and County of San Francisco

Department of Human Resources

PERSONAL SERVICES CONTRACT SUMMARY

DATE: July 16, 2010

DEPARTMENT NAME: Human Resources

DEPARTMENT NUMBER: 33

TYPE OF APPROVAL: ☑ REGULAR (OMIT POSTING ________)

☑ INITIAL REQUEST ☐ MODIFICATION (PSC# _________)

TYPE OF SERVICE: Classification Consulting Services

FUNDING SOURCE: Departmental Work Order

PSC AMOUNT: $150,000


1. DESCRIPTION OF WORK
   A. Concise description of proposed work:
      Consultant will work with Airport and Department of Human Resources ("DHR") staff to improve and expand upon the functionality of DHR's internal Classification database, and develop a consistent methodology for improving classification decisions. Consultant will work with City staff to redesign and develop a database tool to categorize knowledge, skills, abilities, and corresponding activities and tasks consistent with the principles of industry accepted standards, such as O*NET. This new tool will ensure Citywide consistency within the classification plan and will facilitate appropriate classification selections based on multi-level search criteria that accurately reflect duties and responsibilities of the position. The goal of this service is to create a more efficient, standardized, front-end, interactive database tool designed to minimize the potential for appointing officers to make classification decisions based solely on desired pay or other preconceived notions that result in inappropriate grade inflation (e.g., making an appointment to a manager classification when an advanced technical level classification would be more appropriate for the duties and the responsibilities of the position), and reduce inconsistencies and perceived subjectivity in classification decisions throughout the City.

   B. Explain why this service is necessary and the consequences of denial:
      This service will enable the City to improve its approach to classification decisions in an effort to limit inappropriate grade inflation and ensure consistency in appointments throughout the City's numerous departments. This service is crucial to the City's efforts to leverage current available technology and expertise to enhance the existing Classification database. The database redesign and revised classification methodologies will be developed at and applied to the Airport as a pilot project, with Airport human resources staff and DHR analysts providing input as subject-matter experts to the consultant to build on and improve the existing Classification database. Denial of this service would prevent the City from developing much needed improvements in its Classification database and application of classification methodologies.

   C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number):
      Previous service was provided under PSC# 4109-05/06, approved 6/1/2006.

   D. Will the contract(s) be renewed: No.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

   Local 21
   Signature of person mailing/faxing form
   Date

   MEA
   Signature of person mailing/faxing form
   Date

   RFP sent to _________, on _________ Date

   Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4023 - 10/11

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:
DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:
Requires knowledge of a wide variety of human resources classification systems and models, and the contexts in which they are best applied; expertise and experience in developing classification system improvements in large public sector entities; and experience in building and implementing classification databases using the latest technology.

B. Which, if any, civil service class normally performs this work?
There are no civil service classes which normally perform the combination of work required for classification database design unique to classification best practices and methodologies. However, permanent civil service employees in the following classes will work with, and provide input to, the contractor during database development: 1244, Sr. Personnel Analyst; 1052, IS Business Analyst; 1823 Senior Administrative Analyst; and 0931, HR Manager.

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
No.

WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable:
Civil Service classes are applicable and will be involved throughout each phase of the project; however, this project requires experts who possess the depth and breadth of knowledge and experience in both database design and job classification and categorization methodologies. There are no civil service classes which possess the requisite subject matter expertise in large public sector classification best practices and methodologies, human resources competencies and classification database design. Again, the following classes will work with the contractor during database development: 1244, Sr. Personnel Analyst; 1052, IS Business Analyst; 1823 Senior Administrative Analyst; and 0931, HR Manager.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No, it would not be practical to adopt a new civil service class to perform this work, as it requires specific skills and knowledge unique to this one very specific and time-limited project. However, once the project is complete and the database has been redesigned, employees in permanent civil service classifications will be trained to utilize the database consistent with best practice classification methodologies (see response to SB below).

ADDITIONAL INFORMATION (if "yes," attach explanation)

A. Will the contractor directly supervise City and County employees?

B. Will the contractor train City and County employees?
- Describe the training and indicate approximate number of hours.
- Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained.

The classification database system requirements will be managed by a 1052 IS Business Analyst after it has been developed. The consultant will train the 1052 IS Business Analyst to maintain the system and will provide administrator access to add search fields and indexing codes in the future. The consultant will also train the Human Resources staff at DHR and the Airport on maintaining current data within the system. Although the project will be piloted at the Airport, the ultimate goal is to expand it to all City departments for use.

C. Are there legal mandates requiring the use of contractual services?

D. Are there federal or state grant requirements regarding the use of contractual services?

E. Has a board or commission determined that contracting is the most effective way to provide this service?

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:

[Signature]
Signature of Departmental Personal Services Contract Coordinator

Brent Lewis (415) 557-4944

1 South Van Ness Avenue, 4th Floor
San Francisco, CA 94103-5413
PERSONAL SERVICES CONTRACT SUMMARY

DATE: July 16, 2010

DEPARTMENT NAME: Human Resources DEPARTMENT NUMBER 33

TYPE OF APPROVAL: ☑ REGULAR (OMIT POSTING _________ )

TYPE OF REQUEST: ☑ INITIAL REQUEST ☐ MODIFICATION (PSC# _________)

TYPE OF SERVICE: Classification Consulting Services

FUNDING SOURCE: Departmental Work Order

PSC AMOUNT: $150,000 PSC DURATION: 7/1/2010 – 12/31/2011

1. DESCRIPTION OF WORK

A. Concise description of proposed work:
Consultant will work with Airport and Department of Human Resources ("DHR") staff to improve and expand upon the functionality of DHR's internal Classification database, and develop a consistent methodology for improving classification decisions. Consultant will work with City staff to redesign and develop a database tool to categorize knowledge, skills, abilities, and corresponding activities and tasks consistent with the principles of industry accepted standards, such as O*NET. This new tool will ensure Citywide consistency within the classification plan and will facilitate appropriate classification selections based on multi-level search criteria that accurately reflect duties and responsibilities of the position. The goal of this service is to create a highly efficient, standardized, front-end, interactive database tool designed to minimize the potential for appointing officers to make classification decisions based solely on desired pay or other preconceived notions that result in inappropriate grade inflation (e.g., making an appointment to a manager classification when an advanced technical level classification would be more appropriate for the duties and the responsibilities of the position), and reduce inconsistencies and perceived subjectivity in classification decisions throughout the City.

B. Explain why this service is necessary and the consequences of denial:
This service will enable the City to improve its approach to classification decisions in an effort to limit inappropriate grade inflation and ensure consistency in appointments throughout the City’s numerous departments. This service is crucial to the City's efforts to leverage current available technology and expertise to enhance the existing Classification database. The database redesign and revised classification methodologies will be developed at and applied to the Airport as a pilot project, with Airport human resources staff and DHR analysts providing input as subject-matter experts to the consultant to build on and improve the existing Classification database. Denial of this service would prevent the City from developing much needed improvements in its Classification database and application of classification methodologies.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number):
Previous service was provided under PSC# 4109-05/06, approved 5/1/2006.

D. Will the contract(s) be renewed: No.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

Local 21
Union Name __________________________ Signature of person mailing/faxing form __________________________ Date __________________________

MEA
Union Name __________________________ Signature of person mailing/faxing form __________________________ Date __________________________

RFP sent to __________________________, on __________________________, on __________________________.

Union Name __________________________ Date __________________________ Signature __________________________

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# __________________________

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION: 0003
3. **DESCRIPTION OF REQUIRED SKILLS/EXPERTISE**
   A. Specify required skills and/or expertise:
   Requires knowledge of a wide variety of human resources classification systems and models, and the contexts in which they are best applied; expertise and experience in developing classification system improvements in large public sector entities; and experience in building and implementing classification databases using the latest technology.

   B. Which, if any, civil service class normally performs this work?
   There are no civil service classes which normally perform the combination of work required for classification database design unique to classification best practices and methodologies. However, permanent civil service employees in the following classes will work with, and provide input to, the contractor during database development: 1244, Sr. Personnel Analyst; 1052, IS Business Analyst; 1823 Senior Administrative Analyst; and 0931, HR Manager.

   C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: No.

4. **WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM**
   A. Explain why civil service classes are not applicable:
   Civil Service classes are applicable and will be involved throughout each phase of the project; however, this project requires experts who possess the depth and breadth of knowledge and experience in both database design and job classification and categorization methodologies. There are no civil service classes which possess the requisite subject matter expertise in large public sector classification best practices and methodologies, human resources competencies and classification database design. Again, the following classes will work with the contractor during database development: 1244, Sr. Personnel Analyst; 1052, IS Business Analyst; 1823 Senior Administrative Analyst; and 0931, HR Manager.

   B. Would it be practical to adopt a new civil service class to perform this work? Explain.
   No, it would not be practical to adopt a new civil service class to perform this work, as it requires specific skills and knowledge unique to this very specific and time-limited project. However, once the project is complete and the database has been redesigned, employees in permanent civil service classifications will be trained to utilize the database consistent with best practice classification methodologies (see response to 5B below).

5. **ADDITIONAL INFORMATION** (if "yes," attach explanation)
   A. Will the contractor directly supervise City and County employees? Yes No

   B. Will the contractor train City and County employees?
   - Describe the training and indicate approximate number of hours.
   - Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained.

   The classification database system requirements will be managed by a 1052 IS Business Analyst after it has been developed. The consultant will train the 1052 IS Business Analyst to maintain the system and will provide administrator access to add search fields and indexing codes in the future. The consultant will also train the Human Resources staff at DHR and the Airport on maintaining current data within the system. Although the project will be piloted at the Airport, the ultimate goal is to expand it to all City departments for use.

   C. Are there legal mandates requiring the use of contractual services? Yes No

   D. Are there federal or state grant requirements regarding the use of contractual services? Yes No

   E. Has a board or commission determined that contracting is the most effective way to provide this service? Yes No

   F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? Yes No

**THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:**

Signature of Departmental Personal Services Contract Coordinator

Brent Lewis

(415) 557-4944

1 South Van Ness Avenue, 4th Floor
San Francisco, CA 94103-5413
PERSONAL SERVICES CONTRACT SUMMARY

DATE: April 12, 2006

DEPARTMENT NAME: Department of Human Resources

DEPARTMENT NUMBER: 33

TYPE OF APPROVAL: ☐ EXPEDITED ☑ REGULAR (OMIT POSTING _____)

☐ CONTINUING ☐ ANNUAL

TYPE OF REQUEST: ☑ INITIAL REQUEST ☐ MODIFICATION (PSC#______)

TYPE OF SERVICE: Classification consulting services

FUNDING SOURCE: Budgeted reserve

PSC AMOUNT: $150,000 PSC DURATION: May 15, 2006 – December 31, 2006

1. DESCRIPTION OF WORK
   A. Concise description of proposed work: Tasks and deliverables include assessment of the appropriateness and effectiveness of the current Classification Plan ("Plan"); best practices review; summary document with findings, recommendations, and a detailed plan for how to update the Plan; and user needs assessment, data definition, database design and data upload to create a new classification database.

   B. Explain why this service is necessary and the consequences of denial: The Plan and its 1,300 classifications provide the foundation for all personnel-related activities in the City. While DHHR has successfully implemented classification studies to update specific areas of the Plan in recent years, the overall Plan remains outdated and unwieldy, and we need both expert advice and a database tool to manage and improve it. These services are the essential first step in: conducting a systematic review of the Plan needed to meet future service needs; creating the analytical tool needed to update the Plan; and creating a tool to help Client Services representatives with classification services. Denial would prevent the City from meeting important goals, such as reducing the number of tested classifications and thus time to hire, creating position-specific minimum qualifications that recognize the unique needs of departments, and establishing more flexible job families and series to create career paths with promotional opportunities for employees. Continued delay in making improvements to the Plan will exacerbate the existing inefficiencies and obstacles related to the Plan structure, such as lengthy time to hire, lack of career paths, difficulty in meeting succession planning needs, difficulty in recruitment and retention, and others.

   C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number): This service has not been provided in the past.

   D. Will the contract(s) be renewed: The funding is one-time, so it is unlikely the contract would be renewed.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

   Local 21
   Union Name: [Signature of person mailing / faxing form] 4/12/06
   Date

   MEA
   Union Name: [Signature of person mailing / faxing form] 4/12/06
   Date

   RFP sent to Local 21 & MEA on 3/30/06, [Signature] 5/30

   Union Name Date

*****************************************************************************

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4109-05/06
STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION: 0005
DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:
Knowledge of a wide variety of classification systems and models and the contexts in which they are best applied; recent experience in providing expert-level advice in classification system improvements to large public sector entities; and experience in building and implementing classification databases.

B. Which, if any, civil service class normally performs this work?
There are no classes that perform the full range of duties outlined in the RFP, which comprise classification analysis, database development, object management, classification research and policy recommendations. Routine classification work is performed by personnel analysts in classes 1241 and 1244, and directed by employees in classes 1246 and 1270. Business process analysis and database design is typically performed by IS business analysts in classes 1052 and 1053. Finally, best practices research, report writing, policy recommendations and object management are often performed by administrative analysts in classes 1823 and 1824.

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: No.

WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM
A. Explain why civil service classes are not applicable:
Would be costly and impractical to hire staff, as the project requires a wide variety of skills and knowledge to be applied to a one-time object over a short time period. The project also requires a depth and breadth of classification knowledge and experience that we do not currently possess, as current staff have operational and transactional experience as opposed to an applied research focus. Finally, we seek expert-level advice from an independent perspective that will reflect knowledge of a variety of different classification systems.

B. Would it be practical to adopt a new civil service class to perform this work?
Yes, it would not be practical given the duration and one-time nature of the project.

ADDITIONAL INFORMATION (if "yes", attach explanation)

A. Will the contractor directly supervise City and County employees?  
B. Will the contractor train City and County employees?
- Describe training and indicate approximate number of hours.
- Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate number to be trained.

Is possible contractor will train staff in the contents and use of the database. We estimate approximately 30 personnel analysts and related staff would be trained.

C. Are there legal mandates requiring the use of contractual services?  
D. Are there federal or state grant requirements regarding the use of contractual services?  
E. Has a board or commission determined that contracting is the most effective way to provide this service?  
F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:

[Signature]
Patti Martin, Departmental Personal Services Contract Coordinator
1500 Gough Street
San Francisco, CA 94103
(510) 557-4811

0006
Date: 7/20/10

To: Rebecca Rhine, Executive Director
    San Francisco Municipal Executives’ Association

Fax No.: (415) 989-7077          Phone No: (415) 989-7244

From: Cathy Abela
      Department of Human Resources

No. of Pages (including cover): 3

Comments:

Attached is a Personal Services Contract Summary for Classification Consulting Services for the Department of Human Resources. Please contact me at (415) 557-4933 or by email at cathy.abela@sfgov.org, if you have any questions or concerns.

Thank you,
Cathy Abela
**Communication Result Report (Jul. 20, 2010 1:33PM)**

Date/Time: Jul. 20, 2010 1:32PM

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- E. 1) Hang up or line fail
- E. 2) Busy
- E. 3) No answer
- E. 4) Exceeded max. E-mail size
- E. 5) No facsimile connection

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**FAX**

Date: 7/20/10

To: Rebecca Rhode, Executive Director
San Francisco Municipal Executives' Association

Fax No.: (415) 963-7077
Phone No.: (415) 963-7244

From: Cathy Adams
Department of Human Resources

No. of Pages (including covers): 5

Comment:
Attached is a Personnel Services Contract Summary for Classification Counseling Services for the Department of Human Resources. Please contact me at (415) 855-4059 or by email at cathy.adams@sf.gov if you have any questions or concerns.

Thank you,
Cathy Adams
Date: 7/20/10

To: Criss Romero
Joe Brenner
IFPTE, Local 21

Fax No.: (415) 864-2166
Phone No.: (415) 864-2100

From: Cathy Abela
Department of Human Resources

No. of Pages (including cover): 3

Comments:

Attached is a Personal Services Contract Summary for Classification Consulting Services for the Department of Human Resources. Please contact me at (415) 557-4933 or by email at cathy.abela@sfgov.org, if you have any questions or concerns.

Thank you,
Cathy Abela
**Communication Result Report (Jul. 20, 2010 1:34PM)**

**Date/Time:** Jul. 20, 2010 1:33PM

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**Reason for error**

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E. 2) Busy
E. 3) No answer
E. 4) Exceeded max. E-mail size
E. 5) No facsimile connection

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**FAX**

Date: 7/20/10

To: Cathy Abela

HR Office, Local 21

Fax No.: (415) 864-2166

Fax: (415) 864-4579

Phone: (415) 864-2166

No. of Pages: 3

Comments:

Attached is a Personnel Service Contract Summary for Classification Counseling Service for the Department of Human Resources. Please contact me at (415) 864-4579 or by email at cathy.abela@sf.gov if you have any questions or concerns.

Thank you,

Cathy Abela
PERSONAL SERVICES CONTRACT SUMMARY

DATE: 07/15/2010

DEPARTMENT NAME: San Francisco Public Utilities Commission  DEPARTMENT NUMBER 40

TYPE OF APPROVAL: ☑ REGULAR  (OMIT POSTING ________ )
☐ EXPEDITED  ☐ CONTINUING  ☐ ANNUAL

TYPE OF REQUEST: ☑ INITIAL REQUEST  ☐ MODIFICATION (PSC# ________ )

TYPE OF SERVICE: Power Rate Study (CS-159)

FUNDING SOURCE: Operating budget of Hetch Hetchy Water and Power, Power Administration

PSC AMOUNT: $139,000  PSC DURATION: 08/01/2010 to 12/31/2012

1. DESCRIPTION OF WORK
   A. Concise description of proposed work:
   Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service base on their respective service requirements and development of schedules of electric rates to recovery allocated costs from each retail customer class. Contract deliverables in addition to schedules of rates include the development of cost of service model to permit Hetch Hetchy (HH) staff to annually update the cost of service analysis.
   B. Explain why this service is necessary and the consequences of denial:
   Hetch Hetchy Power will be providing retail electric service to Hunters Point Redevelopment and Treasure Island. Retail service must be both cost-based and competitive with other electric providers. HH has previously provided only electricity for City departments. It lacks the expertise needed to design rates for a competitive marketplace. This contract will facilitate HH entry into the retail electric marketplace.
   C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number):
   Hetch Hetchy Power does not currently provide retail electric service; consequently there is no history of this service being provided by the SFPUC. Electric rates charged to City departments are not cost-based, and rates charged to General Fund Departments are set through budget negotiations and the rates to enterprise departments are based on rates charged by PG&E. HH must develop new expertise in cost allocation and rate design for entry into the retail marketplace.
   D. Will the contract(s) be renewed: No.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

L1021  Shamica Jackson  07/21/2010
L21  
Union Name  Signature of person mailing/faxing form  Date

*****************************************************************************
FOR DEPARTMENT OF HUMAN RESOURCES USE  07/28/2010
PSC# 4024-LO/11
STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:

P.YUN  0011
DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
A. Specify required skills and/or expertise:
- Knowledge of electric utility design and operation, knowledge to assign annual revenues to categories of costs based on utility function, knowledge to develop units of service based on energy use and demand by service level, and knowledge of rate structures and design principles. Ability to communicate analysis results to Commission, Rate Fairness Board, SFPUC management and other stakeholders.
B. Which, if any, civil service class normally performs this work? His work is not performed by any civil service class.
C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:

WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM
A. Explain why civil service classes are not applicable:
- Nature of work is very specialized and is historically unprecedented.
B. Would it be practical to adopt a new civil service class to perform this work? Explain:
- There is no ongoing need for this service. However, it is the intent of this contract to develop tools (i.e. cost of service model) that will enable HH staff to conduct cost of service analysis. Because of the technical nature of electric rate design, it may be necessary to retain a contractor in the future to assist with the design of new rates when required.

ADDITIONAL INFORMATION (if "yes," attach explanation)
A. Will the contractor directly supervise City and County employees? Yes ☐ No ☑
B. Will the contractor train City and County employees?
  • Describe the training and indicate approximate number of hours. The training will be incidental to performance of the study tasks:
    - The contractor will provide approximately eight hours of training on completed the cost of service model.
  • Indicate occupational type of City and County employees to receive training
    One Senior Administrative Analyst (1824).
C. Are there legal mandates requiring the use of contractual services?
D. Are there federal or state grant requirements regarding the use of contractual services?
E. Has a board or commission determined that contracting is the most effective way to provide this service? SFPUC Resolution #09-0017
F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:

Signature of Departmental Personal Services Contract Coordinator

Shamica Jackson 415-554-0727
Print or Type Name Telephone Number

1155 Market Street, 9th Floor San Francisco, CA 94103
Address
PUBLIC UTILITIES COMMISSION
City and County of San Francisco

RESOLUTION NO. 09-0017

WHEREAS, the San Francisco Public Utilities Commission (SFPUC), established pursuant to San Francisco Charter Section 4.112, has the "exclusive charge of the construction, management, supervision, maintenance, extension, expansion, operation, use and control of all water, clean water and energy supplies and utilities of the city as well as the real, personal and financial assets, that are under the Commission's jurisdiction or assigned to the Commission under Section 4.132," as provided in San Francisco Charter section 8B121; and

WHEREAS, the SFPUC has a duly appointed General Manager and pursuant to Charter Section 4.126 the General Manager is responsible for the administration and management of the department; and

WHEREAS, this Commission has from time to time identified protocols with respect to Commission review and action on matters within its jurisdiction, and also granted authority to the General Manager to award and execute contracts or leases, or settle or compromise claims, subject to certain terms and limitations; and

WHEREAS, this Commission intends to prioritize the matters presented to the Commission by focusing on items involving critical policy objectives for the SFPUC, and those that are significant, controversial or assigned to the Commission through the City's Administrative Code provisions, and wishes to accomplish this by moving less significant, less controversial items to either a consent calendar or delegating them to the General manager as shown on Attachment A to this Resolution; now, therefore, be it

RESOLVED, That this Commission adopts the criteria set forth in Attachment A with respect to the Commission agenda for actions on contracts, leases and settlement agreements, and hereby delegates to the General Manager of the San Francisco Public Utilities Commission the authority to directly undertake those actions identified in Attachment A, subject to the terms and limitations expressed therein, all as set forth in Attachment A, incorporated in this Resolution by this reference; and be it,

FURTHER RESOLVED, That this Commission directs the General Manager to provide the Commission with a quarterly report identifying the actions taken by the General Manager, pursuant to this grant of authority.

I hereby certify that the foregoing resolution was adopted by the Public Utilities Commission at its meeting of__________________________.

__________________________
Secretary, Public Utilities Commission

January 27, 2009
Jackson, Shamica

From: Jackson, Shamica
Sent: Tuesday, July 20, 2010 5:11 PM
To: Birrer, Joe; Byrne, Ed; Chan, Norman; Divine, Peg; Elwin, Harvey; How, Kathryn; Isen, Carol; Koleini, Amir; Lee, Tedman C; Quan, Linda; Rivera, Patrick; Wang, Jane; Baker, Deborah; Bowman, Lora; 'Brenner, Joe'; 'Delcampo, Frank'; Domingo, Kofo; Jackson, Prentiss; Jackson, Shamica; Kyaun, Florence; Lee, Tedman C; 'Louie, Ging'; McGee, Bonita; Morrison, Emily M.; Ng, Mary; 'Reed, Margot'; 'Rockett, Brigette'; Scott, David E; 'Tamura, Pattie '; 'Wong, Larry'; Yun, Pauson; Palileo, Lucy J; De Vera, Marie
Subject: CS-159, PSC Summary Form (Initial Request)
Importance: High
Attachments: CS-159 PSC Summary Form to DHR 07212010.DOC

1. For Engineering Resources Committee: Attached for your review is the PSC1, Summary Form for CS-159, Power Rate Study, initial request for $139,000.

2. For DHR: We will forward to you for posting upon notification of L21 and other applicable unions.

3. For August 16, 2010 Civil Service Commission Meeting, Room 400 City Hall.

Shamica L. Jackson
San Francisco Public Utilities Commission
Contract Administration Bureau
1155 Market Street, 9th Floor
San Francisco, CA 94103
voice: 415-554-0727
fax: 415-554-3225
email:sjackson@sfwater.org
PERSONAL SERVICES CONTRACT SUMMARY

DATE: 07/16/2010

DEPARTMENT NAME: San Francisco Public Utilities Commission (SFPUC)  DEPARTMENT NUMBER 40

TYPE OF APPROVAL: ☑ REGULAR (OMIT POSTING _________ )
☐ EXPEDITED
☐ CONTINUING
☐ ANNUAL

TYPE OF REQUEST:  ☑ INITIAL REQUEST  ☐ MODIFICATION (PSC# _____________ )

TYPE OF SERVICE: Municipal Financial Advisory Services (CS-163)

FUNDING SOURCE: Primarily Bond Proceeds - Cost of Issuance, SFPUC budget

PSC AMOUNT: $2,500,000  PSC DURATION: 09/15/2010 to 09/15/2017

1. DESCRIPTION OF WORK
A. Concise description of proposed work:
Provide municipal financing advisory services to the SFPUC in the structuring and competitive sale of taxable and tax-exempt revenue bonds, taxable and tax-exempt commercial paper, certificates of participation, Clean Renewable Energy Bonds (CREBs), Qualified Energy Conservation Bonds (QECBs), and other forms of municipal financing.

B. Explain why this service is necessary and the consequences of denial:
These services are required to assist the SFPUC implement the department’s debt financing programs. If these services are denied, the SFPUC will not have access to independent expertise in debt financing which would adversely impact program implementation.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number):
None.

D. Will the contract(s) be renewed: No.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

L1021
L21
Shamica Jackson
Signature of person mailing/faxing form
07/20/2010

FOR DEPARTMENT OF HUMAN RESOURCES USE 7/20/2010

PSC# 40 5 10/11

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:

K. DOMINGO 0815
City and County of San Francisco
DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:
Must have specialized skills in municipal financing advisory services with experience working on taxable and tax-exempt revenue bonds, taxable and tax-exempt commercial paper, and certificates of participation, CREBs, ECBs, and other forms of municipal debt. Must have successfully completed a minimum of two California-based municipal financial advisory projects within the last five years, at least one of which was similar in size and scope to that in the SFPUC Water System Improvement Program (WSIP) program. Lead staff proposed must have had a similar role in at least one of the prior projects submitted. Must submit a certification statement that it holds all licenses and registrations required by applicable federal and state laws for businesses offering financial advisory services. All required licenses and registrations must be current and in good standing. Must submit a Legal Disclosure Certificate related to conflicts of interest, pending litigation or services termination.

B. Which, if any, civil service class normally performs this work? One.

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: he contractor possesses proprietary software to assist in debt modeling.

WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM
A. Explain why civil service classes are not applicable:
1) Existing Civil Service classifications do not possess the specialized skills and expertise required to provide financial advisory services to the SFPUC and, 2) the services are required on a short-term and irregular basis.

B. Would it be practical to adopt a new civil service class to perform this work? Explain. None.

Financial advisory services are required on a short-term, intermittent and intensive basis. The work is not ongoing.

ADDITIONAL INFORMATION (if "yes," attach explanation) Yes No

A. Will the contractor directly supervise City and County employees? [ ] [ X ]

B. Will the contractor train City and County employees?
   • Describe the training and indicate approximate number of hours.
   • Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained. [ ] [ X ]

C. Are there legal mandates requiring the use of contractual services? [ ] [ X ]

D. Are there federal or state grant requirements regarding the use of contractual services? [ ] [ X ]

E. Has a board or commission determined that contracting is the most effective way to provide this service? [ ] [ X ]

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? [ ] [ X ]

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:

_________________________
Signature of Departmental Personal Services Contract Coordinator

Shamica Jackson
Print or Type Name

415-554-0727
Telephone Number

1155 Market Street, 9th Floor
San Francisco, CA 94103
Address

K. DOMINGO

PSC FORM 1 (9/96)
Jackson, Shamica

From: Jackson, Shamica
Sent: Tuesday, July 20, 2010 4:28 PM
To: Birrer, Joe; Byrne, Ed; Chan, Norman; Divine, Peg; Elwin, Harvey; How, Kathryn; Isen, Carol; Koleini, Amir; Lee, Tedman C; Quan, Linda; Rivera, Patrick; Wang, Jane; Baker, Deborah; Bowman, Lora; 'Brenner, Joe'; 'Delcampo, Frank'; Domingo, Kofo; Jackson, Prentiss; Jackson, Shamica; Kyaun, Florence; Lee, Tedman C; 'Louie, Ging'; McGee, Bonita; Morrison, Emily M.; Ng, Mary; 'Reed, Margot'; 'Rockett, Brigette'; Scott, David E; 'Tamura, Pottie '; 'Wong, Larrry'; Yun, Pauson; Pailleo, Lucy J; De Vera, Marie
Subject: CS-163, PSC Summary Form (Initial Request)
Importance: High
Attachments: CS-163 PSC Summary Form to DHR 07212010.DOC

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3. For August 16, 2010 Civil Service Commission Meeting, Room 400 City Hall.

Shamica L. Jackson
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