Date: August 20, 2012

To: The Honorable Civil Service Commission

Through: Micki Callahan
Human Resources Director

From: Kendall Gary, DT
Shamica Jackson, PUC
Brent Lewis, HRD
Merrick Pascual, ECN

Subject: Personal Services Contracts Approval Request

This report contains six (6) 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 2012-2013</th>
<th>Total for FY 2012-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,335,945</td>
<td>$219,480</td>
<td>$43,953,144</td>
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</table>
## PROPOSED PERSONAL SERVICES CONTRACTS - Regular

<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>4016-12/13</td>
<td>21</td>
<td>Business, Economic Development</td>
<td>Regular</td>
<td>$250,000</td>
<td>OEWD seeks a small business and real estate loan administrator(s) to screen loan applications and provide technical assistance to prospective loan borrowers, document local and federal program eligibility, underwrite loan applications, secure Department of Housing and Urban Development (HUD) approval of applications, present to loan committees, assist in loan closings, and help manage repayments. Funding is originated from general funds for Emerging Business Loan Program and a federal department for Section 108 Loan Program. The City's loan must be repaid, therefore, the consultant must conduct a detailed credit analysis, based on credit information furnished by the borrower. In order to mitigate losses for Section 108 Loan Program, the City is looking for a loan administrator to provide a loan loss reserve of 8% of Section 108 funding of $23 million.</td>
<td>10/1/2012 - 12/31/2014</td>
</tr>
<tr>
<td>4017-12/13</td>
<td>40</td>
<td>Public Utilities Commission</td>
<td>Regular</td>
<td>$1,500,000</td>
<td>Consultant Services are need to monitor the technical and procedural sufficiency of the SFPUC's administration of the Community Choice Aggregation (CCA) Program, verify the economic assumptions and feasibility of the CCA Program and recommend to the San Francisco Local Agency Formation Commission (SF LAFCO) improvements to ensure its success.</td>
<td>8/20/2012 - 3/31/2013</td>
</tr>
<tr>
<td>4018-12/13</td>
<td>75</td>
<td>Dept.of Technology</td>
<td>Regular</td>
<td>$386,945</td>
<td>This contract will consist of the services of an independent consultant with the technical expertise to perform a detailed inventory and infrastructure demographics of the City's Avaya PBX (Private Branch xExchange) telephone system, which is currently under a separate maintenance and support contract. The telecom consultant will provide an accurate inventory of all major components of the system. This will include all supporting infrastructure, trunks and lines.</td>
<td>8/20/2012 - 4/30/2013</td>
</tr>
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**Total Amount - Regular:** $2,136,945
## PROPOSED PERSONAL SERVICES CONTRACTS

### MODIFICATION TO INCREASE CONTRACT AMOUNT/DURATION

<table>
<thead>
<tr>
<th>PSC No</th>
<th>DeptNo</th>
<th>Dept Description</th>
<th>Approval Type</th>
<th>Modified Amount</th>
<th>Cumulative Total</th>
<th>Description of Work</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>3013-11/12</td>
<td>21</td>
<td>Business, Economic Development</td>
<td>Regular</td>
<td>$100,000</td>
<td>$149,900</td>
<td>The consultant will increase capacity with OEWD grantees who operate the City's One Stop Career Link Centers. Contractor's work will be focused on sector-based training research, including sectors in demand and performance of training providers currently on the State's Eligible Training Provider listing. Consultants will conduct technical assistance and training with One-Stop staff, Sector Academy Staff, and/or OEWD staff on research, best practices, high performing training providers, and growth industries' sectors to ensure that all parties can assist Workforce Investment Act program participants to make informed choices about training options. The consultant will assist in overseeing the implementation of any program or operatioonal changes and may also facilitate partnerships.</td>
<td>8/24/2011</td>
<td>2/31/2013</td>
</tr>
<tr>
<td>3046-11/12</td>
<td>33</td>
<td>Human Resources</td>
<td>Regular</td>
<td>$50,000</td>
<td>$99,500</td>
<td>The Contractor shall provide contract management advisory and quality assurance services to ensure compliance with City requirements and timely, defendable execution of contracting processes. Services shall include guidance on pre-solicitation, solicitation, evaluation, and negotiations, as well as post-contract management issues.</td>
<td>1/1/2012</td>
<td>6/30/2013</td>
</tr>
<tr>
<td>3116-09/10</td>
<td>40</td>
<td>Public Utilities Commission</td>
<td>Regular</td>
<td>$49,000</td>
<td>$98,000</td>
<td>Hosting, production and distribution of six bi-monthly issues of Digital Currents (the SFPUCC's electronic external newsletter) annually.</td>
<td>9/1/2010</td>
<td>8/31/2013</td>
</tr>
</tbody>
</table>

**Sum of Modified Amounts:** $199,000
Kendall Gary
Department of Technology
1 South Van Ness, 2nd Floor
San Francisco, CA 94103

Shamica Jackson
Public Utilities Commission
1155 Market Street, 9th Floor
San Francisco, CA 94103

Brent Lewis
Department of Human Resources
1 South Van Ness, 4th Floor
San Francisco, CA 94103

Merrick Pascual
Mayor's Office of Economic & Workforce Dev.
1 South Van Ness, 5th Floor
San Francisco, CA 94102
<table>
<thead>
<tr>
<th>PSC#</th>
<th>Department</th>
<th>Page#</th>
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<tr>
<td>4016-12/13</td>
<td>Mayor's Office of Economic &amp; Workforce Development</td>
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<td>Public Utilities Commission</td>
<td>8</td>
</tr>
<tr>
<td>4018-12/13</td>
<td>Department of Technology</td>
<td>20</td>
</tr>
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**Modifications**

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<th>Department</th>
<th>Page#</th>
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<tr>
<td>3013-11/12</td>
<td>Mayor's Office of Economic &amp; Workforce Development</td>
<td>24</td>
</tr>
<tr>
<td>3046-11/12</td>
<td>Human Resources</td>
<td>34</td>
</tr>
<tr>
<td>3116-09/10</td>
<td>Public Utilities Commission</td>
<td>37</td>
</tr>
</tbody>
</table>
City and County of San Francisco

Department of Human Resources

PERSONAL SERVICES CONTRACT SUMMARY

DATE: June 25, 2012

DEPARTMENT NAME: Office of Economic and Workforce Development
DEPARTMENT NUMBER: 21

TYPE OF APPROVAL: ☒ EXPEDITED ☑ REGULAR (OMIT POSTING ____ )

☑ CONTINUING ☐ ANNUAL

TYPE OF REQUEST: INITIAL REQUEST ☐ MODIFICATION (PSC# ____ )

TYPE OF SERVICE: Loan Administration for Small Business Loan Programs – Emerging Business Loan Program and Section 108 Loan Program

FUNDING SOURCE: Community Development Block Grant (CDBG) supplemented by General Fund

PSC AMOUNT: $250,000 PSC DURATION: 2+ years Oct. 1, 2012 – December 31, 2014

1. DESCRIPTION OF WORK
   A. Concise description of proposed work:
   OEWD seeks a small business and real estate loan administrator(s) to screen loan applications and provide technical assistance to prospective loan borrowers, document local and federal program eligibility, underwrite loan applications, secure Department of Housing and Urban Development (HUD) approval of loan applications, present to loan committee, assist in loan closings, and help manage repayments. Funding is originated from general funds for Emerging Business Loan Program and a federal department for Section 108 Loan Program. The City’s loan must be repaid, therefore, the consultant must conduct a detailed credit analysis, based on credit information furnished by the borrower. In order to mitigate losses for Section 108 Loan Program, the City is looking for a loan administrator to provide a loan loss reserve of 8% of Section 108 funding of $23 million.
   
   B. Explain why this service is necessary and the consequences of denial:
   The work is important because the projects that the programs can finance can generate many jobs for the City’s residents. In fact, job creation is required because in order to access below market loans, the borrower must provide a public benefit, to generate one full time equivalent (FTE) job for every $35,000 loaned. If this request for this service is denied, the City cannot access flexible and affordable financing for the City’s businesses. Most banks are still not lending to businesses.
   
   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):
   Staff at the Mayor’s Office of Housing made one Section 108 loan to an economic development project in 2006. Since repayments began, the borrower has been delinquent in repayments. We believe that with an experienced commercial lender, the City would be in a better position to prevent such problems, and with a loan loss reserve in place as well as loan loss guarantees, the program can benefit many.
   
   D. Will the contract(s) be renewed: ☑

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

<table>
<thead>
<tr>
<th>IFPTE Local 21</th>
<th>Signature of person mailing/faxing form</th>
<th>June 25, 2012</th>
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</thead>
<tbody>
<tr>
<td>Union Name</td>
<td></td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MEA</th>
<th>Signature of person mailing/faxing form</th>
<th>June 25, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union Name</td>
<td></td>
<td>Date</td>
</tr>
</tbody>
</table>

RFP sent to ________ Union Name, on ________ Date, by ________ Signature

**********************************************************************************************************************
FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4016 - 12/13

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION: 0001

Received 7/25/12
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise:
      The consultant must be familiar with San Francisco business processes. Consultants will work with potential borrowers at their place of business to understand their business practices and identify their goals and needs. The consultant must have the experience and capacity to originate business and real estate loans and gather, analyze, and discuss credit and financial information to determine credit quality. Consultant should have relationships with local economic development organizations and banking institutions to refer potential borrower to other resources for additional needs. Consultant must have strong credit analysis and credit review knowledge and strong underwriting and financial statement review skills.

   B. Which, if any, civil service class normally performs this work?
      None

   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:
      This service is a specialized because the consultant should have many years of experience assessing small businesses and real estate development projects to be able to assist businesses and mitigate loan losses.

   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 for specialized underwriting tasks that are performed for small businesses and real estate projects. Contracting through consultants is cost effective and efficient.

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

   B. Will the contractor train City and County employees?
      No

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

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

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

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

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

Signature of Departmental Personal Services Contract Coordinator
Merrick Pascual
Print or Type Name
(415) 701-5511
Telephone Number
1 South Van Ness, 5th Floor
San Francisco, CA 94103
Address
Good afternoon,

Attached please find PSC summary for services to administer loan fund programs. If you have any questions, please feel free to contact me.

PSCForm1 Loan Administrator 0EWD.pdf

Best,
Holly

Holly Lung
Program Manager, Neighborhood Economic Development
Office of Economic and Workforce Development
1 Dr. Carlton B. Goodlett Place, Room 448
San Francisco, CA 94102

(415) 554-6628
holly.lung@sfgov.org
Good afternoon,

Attached please find PSC summary for services to administer loan fund programs. If you have any questions, please feel free to contact me.

Best,
Holly

Holly Lung
Program Manager, Neighborhood Economic Development
Office of Economic and Workforce Development
1 Dr. Carlton B. Goodlett Place, Room 448
San Francisco, CA 94102

(415) 554-6628
holly.lung@sfgov.org
Hi Rebecca,

Please find attached PSC Form 1 for your review.

Best,
Holly

Holly Lung
Program Manager, Neighborhood Economic Development
Office of Economic and Workforce Development
1 Dr. Carlton B. Goodlett Place, Room 448
San Francisco, CA 94102

(415) 554-6628
holly.lung@sfgov.org

----- Forwarded by Holly Lung/MAYOR/SFGOV on 06/25/2012 02:25 PM -----

From: Holly Lung/MAYOR/SFGOV
To: staff@sfmneab.com
Date: 06/25/2012 02:16 PM
Subject: PSC Summary Form for Services to Administer Loan Programs

Good afternoon,

Attached please find PSC summary for services to administer loan fund programs. If you have any questions, please feel free to contact me.

Best,
Holly

Holly Lung
Program Manager, Neighborhood Economic Development
Office of Economic and Workforce Development
1 Dr. Carlton B. Goodlett Place, Room 448
San Francisco, CA 94102

(415) 554-6628
holly.lung@sfgov.org
MEMORANDUM

TO: Rebecca Rhine
FROM: Holly Lung
DATE: June 25, 2012
RE: PSC Form 1 – Loan Administrators.

Please find PSC Form 1 for your review.

Best,
Holly

Holly Lung
Program Manager, Neighborhood Economic Development
Office of Economic and Workforce Development
1 Dr. Carlton B. Goodlett Place, Room 448
San Francisco, CA 94102

(415) 554-6628
holly.lung@sfgov.org
## Fax Call Report

### Economic Development
415-554-6018
Jun/25/2012 2:53:37 PM

<table>
<thead>
<tr>
<th>Job</th>
<th>Date/Time</th>
<th>Type</th>
<th>Identification</th>
<th>Duration</th>
<th>Pages</th>
<th>Result</th>
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<td>Send</td>
<td>99897077</td>
<td>1:20</td>
<td>3</td>
<td>Success</td>
</tr>
</tbody>
</table>

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**MEMORANDUM**

**TO:** Salome Dixon
**FROM:** Vivie Long
**DATE:** June 25, 2012

Subject: Proposal Review

Please review the attached proposal and provide feedback.

Vivie Long
Regional Buyer, Neighborhood Development
Office of Equitable and Affordable Development
110 Cesar E. Chavez Avenue, Suite 400
San Francisco, CA 94132

(415) 554-6018
vlong@sf.gov
DATE: 7/25/2012

DEPARTMENT NAME: San Francisco Public Utilities Commission

DEPARTMENT NUMBER: 40

TYPE OF APPROVAL: ☒ REGULAR (OMIT POSTING ________)

TYPE OF REQUEST: ☒ INITIAL REQUEST

TYPE OF SERVICE: Technical and Advisory Services for Utility Financing: Community Choice Aggregation Program (Joint SFPUC and LAFCO Project) (CS-920R)

FUNDING SOURCE: State and Local Prop H Bond Funding

Original Amount: $1,500,000  Original Duration: 8/20/2012 – 3/31/2013

1. DESCRIPTION OF WORK:
   Concise description of work: Consultant services are needed to monitor the technical and procedural sufficiency of the SFPUC’s administration of the Community Choice Aggregation (CCA) Program, verify the economic assumptions and feasibility of the CCA Program and recommend to the San Francisco Local Agency Formation Commission (SF LAFCO) improvements to assure its success.

   B. Explain why this service is necessary and the consequences of denial: The renewable power generation proposed to be installed through the San Francisco CCA Program will result in the implementation of one of the highest percentage renewable power mixes for any retail seller of electricity nationwide. The proposed CCA Program will also result in the construction of the world’s largest municipal green power public works project — to provide much of the renewable power in the CCA portfolio. For these reasons, the implementation of San Francisco’s CCA Program will become a significant and historic development in the implementation of renewable energy technologies. This modification will allow additional time necessary to finalize the task order work currently underway regarding concepts for local renewable build-out for the CCA program.

   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 been provided by PSC No. 4067 – 07/08 (CS-920R).

   D. Will the contract(s) be renewed? No, renewal is not anticipated at this time.

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

   L21 Shamica Jackson
   Union Name Signature of person mailing/faxing form 7/25/2012 Date

******************************************************************************
FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4017 - 12/13

STAFF ANALYSIS/RECOMMENDATION:
CIVIL SERVICE COMMISSION ACTION:

Received 7/25/12

D.F. SCOTT  PSCForm1.doc/VC/bb_6/20/00
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise: Technical expertise in the area of energy (electric) public or private utility programs and financing, California Public Utilities Commission (CPUC) regulatory process to assist in receiving CPUC rulings on the CCA program as required under statute, implementation of energy programs, and marketing and consumer experience with new energy programs, legal representation in the area of financing renewable energy programs and advice regarding CCA implementation.

   B. Which, if any, civil service class normally performs this work? None known.

   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: No civil service classifications have been identified to possess the technical and expert knowledge needed as specified in question 3A (above) to oversee the successful outcome of this project.

   B. Would it be practical to adopt a new civil service class to perform this work? Explain: No. The development and implementation of this project is expected to conclude after the initial 3-year start-up and implementation; therefore it would not be practical to adopt a new civil service classification.

5. ADDITIONAL INFORMATION (if yes, attach explanation)
   A. Will the contractor directly supervise City & County employees? YES ☐ NO ☑

   B. Will the contractor train City & County employees? Describe the training and indicate approximate number of hours. Indicate occupational type of City & County employees to receive training (i.e., clerks, civil engineers, etc) and approximate number of hours to 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? State Mandated Agency: See Government Code under LAFCO Section 56000, et seq.

   E. Has a board or commission determined that contracting is the most effective way to provide this service? Yes, via Resolution No. 11-0138 passed on 07/26/2011, and by S.F. LAFCO Ordinance 146-07, passed on 06/06/2007.

   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

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

Address
Ryan, Maria

From: Jackson, Shamica <SJackson@sfwater.org>
Sent: Wednesday, July 25, 2012 4:50 PM
To: Bowman, Lora; Brenner, Joe; Byrne, Kyna; Carter, Kim; Demmerle, Brook; DHR-PSSCoordinator; DHR; Domingo, Kofo; Jackson, Prentiss; Jackson, Shamica; Jenkins, Sharon; Jones, LaWan; L21PSCReview; Lee, Tedman; Louie, Ging; McGee, Bonita; Scott, David; Tamura, Pattie; Warshauer, Ed; Yun, Pauson; Birrer, Joe; Byrne, Ed; Chan, Norman; Divine, Peg; Elwin, Harvey; How, Kathryn; Isen, Carol; Koleini, Amir; Lee, Tedman; Rivera, Patrick; Wang, Jane; Degrafmried, Alaric
Subject: CS-920R, PSC Summary Form (Initial Request)
Attachments: CS-920R PSC TO DHR 07252012.pdf

1. For Engineering Resources Committee: Attached for your review is the PSC1, Summary Form for CS-920R, Technical and Advisory Services for Utility Financing: Community Choice Aggregation Program (Joint SFPUC and LAFCO Project), initial request for $1,500,000 and duration to March 31, 2013.

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

3. Thirty-day Union notification required? If no, please explain. No, there are no affected unions to notice.

4. For August 20, 2012 Commission Meeting at 2:00 PM, City Hall Room 400.

Shamica L. Jackson
San Francisco Public Utilities Commission
Contract Administration Bureau
525 Golden Gate Avenue, 8th Floor
San Francisco, CA 94102
voice: 415-554-0727
fax: 415-554-3225
email: sjackson@sfwater.org

Please consider the environment before printing this email
PERSONAL SERVICES CONTRACT SUMMARY

DATE: November 21, 2007

DEPARTMENT NAME: San Francisco Public Utilities Commission  DEPARTMENT NUMBER: 40

TYPE OF APPROVAL: ☒ REGULAR (OMIT POSTING ________)

TYPE OF REQUEST: ☒ INITIAL REQUEST

TYPE OF SERVICE: Technical and Advisory Services for Utility Financing: Community Choice Aggregation Program (Joint SFPUC and LAFCO Project) (CS-920)

FUNDING SOURCE: State and Local Prop H Bond Funding

PSC AMOUNT: $1,500,000  PSC DURATION: 1/1/2008 - 12/31/2010 (3 Years)

1. DESCRIPTION OF WORK:
Concise description of work: Consultant services are needed to monitor the technical and procedural sufficiency of the SFPUC’s administration of the Community Choice Aggregation (CCA) Program, verify the economic assumptions and feasibility of the CCA Program and recommend to the San Francisco Local Agency Formation Commission (SF LAFCO) improvements to assure its success.

B. Explain why this service is necessary and the consequences of denial: The renewable power generation proposed to be installed through the San Francisco CCA Program will result in the implementation of one of the highest percentage renewable power mixes for any retail seller of electricity nationwide. The proposed CCA Program will also result in the construction of the world’s largest municipal green power public works project— to provide much of the renewable power in the CCA portfolio. For these reasons, the implementation of San Francisco’s CCA Program will become a significant and historic development in the implementation of renewable energy technologies; and denial of the contract would hinder these developments.

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. No, renewal is not anticipated at this time.

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

L21

Shamica Jackson

Date

Signature of person mailing/faxing form

RFP sent to on Date Signature

Union Name

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4067 - 07/08 COPY

STAFF ANALYSIS/RECOMMENDATION:
CIVIL SERVICE COMMISSION ACTION:

PSC FORM I (9/96) 11/21/2007
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise: Technical expertise in the area of energy (electric) public or private utility programs and financing, CPUC regulatory process to assist in receiving CPUC rulings on the CCA program as required under statute, implementation of energy programs, and marketing and consumer experience with new energy programs, legal representation in the area of financing renewable energy programs and advice regarding CCA implementation.

   B. Which, if any, civil service class normally performs this work? None known.

   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: No civil service classifications have been identified to posses the technical and expert knowledge needed to oversee the successful outcome of this project. (See question #3A).

   B. Would it be practical to adopt a new civil service class to perform this work? Explain No. The development and implementation of this project is expected to conclude after the initial 3-year start-up and implementation; therefore it would not be practical to adopt a new civil service classification.

5. ADDITIONAL INFORMATION (if yes, attach explanation)
   A. Will the contractor directly supervise City & County employees? [ ] YES  [ ] NO

   B. Will the contractor train City & County employees?
      Describe the training and indicate approximate number of hours. Indicate occupational type of City & County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number of hours to be trained.
      [ ] YES  [ ] NO

   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? State Mandated Agency: See Government Code under LAFCO Section 560000, et seq.
      [ ] YES  [ ] NO

   E. Has a board or commission determined that contracting is the most effective way to provide this service? 12/15/03 #03-0245 and by S.F. LAFCO Ordinance 146-07, passed on 6/6/07
      [ ] 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]
Signature of Departmental Personal Services Contract Coordinator

Connie Chang
Print or Type Name
(415) 554-3497
Telephone

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

Address

PSC FORM I (9/96) 0012
PUBLIC UTILITIES COMMISSION
City and County of San Francisco

RESOLUTION NO. 03-0245

WHEREAS, implementation of the Capital Improvement Program requires that the SFPUC process contract actions more efficiently; and

WHEREAS, Some contract action approval practices can be simplified to accelerate the approval procedure while still providing the Commission with all essential information; and

WHEREAS, To improve the efficiency and speed of the contract action approval process and its consequent impact on the contracting process, SFPUC staff proposes certain changes to its current contract action process; and

WHEREAS, SFPUC staff is proposing to create a monthly General Manager’s Report to the Commission for approval of all contract advertisement actions; and

WHEREAS, SFPUC staff shall present contract awards as consent calendar items for CIP contracts under $5 million and routine water/sewer main repairs, and all other awards shall be presented as regular calendar items; and

WHEREAS, SFPUC staff shall present contract modifications over 10% of cost or schedule as regular calendar items; and

WHEREAS, SFPUC staff shall present contract closeouts as consent calendar items for all contracts under $5 million and as regular calendar items for all contracts with a value of $5 million or above; and

WHEREAS, SFPUC staff shall present all emergency declarations as consent calendar items; now, therefore, be it

RESOLVED, That this Commission hereby approves and authorizes the General Manager to implement an SFPUC staff proposal to modify current Commission contract action approval practices by using a combination of a General Manager’s Report, the consent calendar, and the regular calendar to approve contract actions.

I hereby certify that the foregoing resolution was adopted by the Public Utilities Commission at its meeting of December 15, 2003

[Signature]
Secretary, Public Utilities Commission
Jackson, Shamica

From: Jackson, Shamica
Sent: Wednesday, November 21, 2007 2:22 PM
To: Byrne, Ed; Chia, James; Eavis, Ernie; Elwin, Harvey; Isen, Carol; Jew, Ken; Jindal, Roop; Sadden, Brian; Baker, Deborah; Chang, Connie; 'Chapman, Jet'; 'Delcampo, Frank'; 'Farbod Pirouzmand (E-mail)'; Jackson, Shamica; McGee, Bonita; 'Michael Seville (E-mail)'; Morrison, Emily M.; Rockett, Brigitte; Yun, Pauson; Rohrbacker, Mary
Subject: CS-920 PSC Summary
Importance: High

1. For Engineering Resources Committee: Attached for your review is the PSC1, Summary Form for CS-920, Technical and Advisory Services for Utility Financing: Community Choice Aggregation Program.

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

3. Meeting: December 17, 2007, 2:00 PM, Room 400, City Hall.

Shamica L. Jackson
Commission Agenda Item & Task Order Manager
SFPUC-Contract Administration Bureau
1155 Market Street, 9th Floor
San Francisco, CA 94103
415-554-0727
SJackson@sfwater.org
CIVIL SERVICE COMMISSION
CITY AND COUNTY OF SAN FRANCISCO

January 9, 2008

NOTICE OF CIVIL SERVICE COMMISSION ACTION

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBER 4067-07/08.

At its meeting of January 7, 2008 the Civil Service Commission had for its consideration the above matter.

PLEASE NOTE: It is important that a copy of this action be kept in the department files as you will need it in the future as proof of Civil Service Commission approval.

It was the decision of the Commission to adopt the Human Resources Director’s report. Notify the offices of the Controller and the Purchaser.

If this matter is subject to Code of Civil Procedure (CCP) Section 1094.5, the time within which judicial review must be sought is set forth in CCP Section 1094.6.

CIVIL SERVICE COMMISSION

ANITA SANCHEZ
Executive Officer

Attachment

c: Micki Callahan, Human Resources Director
    Connie Chang, Public Utilities Commission
    Jennifer Johnston, Department of Human Resources
    Jonathan Nelly, Department of Human Resources
    Pauson Yun, Public Utilities Commission
    Commission File
    Commissioners Binder
    Chron
# RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

<table>
<thead>
<tr>
<th>PSC No.</th>
<th>DeptNo</th>
<th>DeptName</th>
<th>Approval Type</th>
<th>Contract Amount</th>
<th>Description of work</th>
<th>Duration</th>
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<tr>
<td>4065-07/08</td>
<td>27</td>
<td>Airport Commission</td>
<td>Regular</td>
<td>$6,000,000.00</td>
<td>Will provide design, fabrication, installation, operation and maintenance of an Airport-owned Distributed Antenna System (DAS) for cellular and other wireless and radio frequency (RF) based communication services throughout the Airport.</td>
<td>31-Dec-15</td>
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<tr>
<td>CS-92-0</td>
<td>40</td>
<td>San Francisco Public Utilities Commission</td>
<td>Regular</td>
<td>$1,500,000.00</td>
<td>Will provide consultant services to monitor the technical and procedural sufficiency of the SFPUC's administration of the Community Choice Aggregation (CCA) Program.</td>
<td>31-Dec-10</td>
</tr>
</tbody>
</table>
MEMORANDUM

DATE: November 15, 2011
TO: Maria Ryan, DHR-PSC Coordinator
    Department of Human Resources (Dept. 33)
FROM: Shamica Jackson, PSC Coordinator
      David E. Scott, PSC Coordinator
      Pauson Yun, Contract Analyst
      San Francisco Public Utilities Commission (Dept. # 40)
RE: Request for Administrative Approval of PSC Modification (less than 50%)

PSC No: 4067-07/08
Description of Service(s): The Community Choice Aggregation (CCA) program was established by Ordinance 86-04 in May 2004 to provide electricity service to customers in the City and County of San Francisco and to accelerate the introduction of renewable energy, conservation and energy efficiency into San Francisco’s portfolio of energy resources. Ongoing development and implementation of the CCA program requires compliance with state regulations, analysis of various program elements, and the creation of a commercially-viable product offering. Work under consists of reviewing the CCA implementation plan; developing financial models; developing renewable projects; and drafting language that may be included in request(s) for proposals (RFPs). (CS-920R)

Original Approved Amount: $1,500,000
Modification Amount: $0
Total Amount as Modified: $1,500,000

Reason for the modification:
Extending the agreement to allow SFPUC the additional time necessary to utilize the contractors’ expertise through the launch of the CCA program.

Attachments: Copy of PSC Summary sent to DHR.

FOR DEPARTMENT OF HUMAN RESOURCES USE

DHR ACTION: ☑ Approved
Approval Date: 11/15/11

By: [Signature]

Micki Callahan, Human Resources Director
PUBLIC UTILITIES COMMISSION
City and County of San Francisco

RESOLUTION NO. 11-0138

WHEREAS, On September 1, 2008, this Commission awarded Agreement Nos. CS-920(R)A and CS-920(R)B, Monitoring and Advisory Services on Behalf of the San Francisco Public Utilities Commission for the Community Choice Aggregation (CCA) Program, and authorized the General Manager of the San Francisco Public Utilities Commission to execute two professional services agreements, each in the amount of $500,000, and each with a term of three (3) years, concluding on August 31, 2011, with George E. Sansoucy PE, LLC (GES) CS-920(R)A and Local Power, Inc. (LPI) CS-920(R)B; and

WHEREAS, Amendment No. 1, for Agreement No. CS-920(R)A, with George E. Sansoucy PE, LLC, was issued on May 1, 2009, increasing the agreement value from $500,000 to $700,000; and

WHEREAS, Amendment No. 2, for Agreement No. CS-920(R)A, with George E. Sansoucy PE, LLC, is being requested to allow SFPUC the additional time necessary to utilize the contractors’ expertise through the launch of the CCA program, extending the agreement by one (1) year to August 31, 2012, for total duration of four (4) years; and

WHEREAS, Amendment No. 1, for Agreement No. CS-920(R)B, with Local Power, Inc., is being requested to allow SFPUC the additional time necessary to utilize the contractors’ expertise through the launch of the CCA program, extending the agreement by one (1) year to August 31, 2012, for total duration of four (4) years; and

WHEREAS, A Human Rights Commission (HRC) subconsulting goal of 15% Local Business Enterprise (LBE) participation has been established for each agreement; and

WHEREAS, On February 8, 2011, the SFPUC resolved that “the General manager of the SFPUC shall direct SFPUC staff to develop a process, and scope of work, together with stakeholders and consultants, to request bids for renewable generation and green resource commitments to further the adopted City goals for CCA as described in Ordinance 147-07, shall initiate timely action on the process and scope of work, and shall report on the status of these efforts to the Commission by July 2011” (Resolution 11-0027); and

WHEREAS, Numerous meetings have been held with consultants and stakeholders to discuss development of new renewable resources, and two scopes of work were proposed to consultants; and

WHEREAS, The remaining budget for Agreement No. CS-920(R)B, with Local Power, Inc., is $390,000, and the remaining budget for Agreement No. CS-920(R)A, with George E. Sansoucy PE, LLC, is $184,000; and

WHEREAS, Funds for this agreement will be available from Project CUH978 Community Choice Project; now, therefore, be it

RESOLVED, That this Commission hereby approves Amendment No. 2 and Amendment No. 1, respectively, to Power Enterprise, Community Choice Aggregation (CCA) Project-funded Agreement Nos. CS-920(R)A with George E. Sansoucy, PE, LLC and CS-920(R)B with Local Power, Inc., Monitoring and Advisory Services for the CCA Program; and authorizes the General Manager of the San Francisco Public Utilities Commission to execute these two
amendments, each with a time extension of one (1) year, for a total agreement duration of four (4) years each, expiring August 31, 2012; and be it

FURTHER RESOLVED, That the General Manager shall continue to work with stakeholders to advance local construction of energy efficiency and generation resources, and attendant local jobs, and report on progress on the local build-out plan regularly.

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

July 26, 2011

[Signature]
Secretary, Public Utilities Commission
PERSONAL SERVICES CONTRACT SUMMARY

DATE: 7-25-2012
DEPARTMENT NAME: Department of Technology
DEPARTMENT NUMBER: 75

TYPE OF APPROVAL: [x] REGULAR (OMIT POSTING ____)

TYPE OF REQUEST: [x] INITIAL REQUEST

TYPE OF SERVICE: Telecom System Audit/Inventory Service

FUNDING SOURCE: General Funds

PSC AMOUNT: $386,945 (estimated) PSC DURATION: August 20, 2012 to April 30, 2013

1. DESCRIPTION OF WORK

A. Concise description of proposed work: This contract will consist of the services of an independent consultant with the technical expertise to perform a detailed inventory and infrastructure demographics of the City’s Avaya PBX (Private Branch eXchange) telephone system, which is currently under a separate maintenance and support contract. The telecom consultant will provide an accurate inventory of all major components of the system. This will include all supporting infrastructure, trunks and lines.

B. Explain why this service is necessary and the consequence of denial: The results of this system audit will allow efficient management of future maintenance contracts, upgrades, expansions, enhancements, and replacements. Denial of this service would impede the Department’s efforts to prevent countless dollars unnecessarily wasted on telephone lines, circuits, and services that are un-used, unknown, unauthorized, or incorrect.

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 type of audit/inventory has never been done.

D. Will the contract(s) be renewed? This contract will not be renewed. However, the Department may consider this type audit/inventory in the future in tandem with expiring maintenance contracts in order to optimize telecom operations for maximum efficiencies.

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

[ ] IFPTE Local 21
Union Name
Sheila A Maxwell
Signature of person mailing/faxing form
6-25-2012
Date

[ ] IFPTE Local 21
Union Name
Sheila A Maxwell
Signature of person mailing/faxing form
6-25-2012
Date

[ ] RFP sent to IFPTE Local 21, on 6-25-2012
Union Name
Date
Signature

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4018 - 12/13
STAFF ANALYSIS/RECOMMENDATION:

Received 7/24/12

PSC FORM 1 (9/6)
CIVIL SERVICE COMMISSION ACTION:

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise: This work requires an independent party, with specialized Avaya certification, experience, and skill set in a large enterprise network with multiple sites. Avaya certification is required to access the PBX telephone system as well as to avoid breach of warranties.

   B. Which, if any, civil service class normally performs this work? There is no civil service class that normally performs this work. The closest related job class is 1071 IS Manager and 1043 IS Engineer. This work requires specialized knowledge of Automatic Call Distribution (ACD) on PBX telephone system platforms and all associated telephone equipment and circuits.

   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: At present, CCSF telephony staff do not possess the required expertise to perform this work. This work requires certification of access to the PBX telephone system and expert knowledge of the system to perform the necessary functions. Current CCSF telephony teams' duties involve mostly contact of vendor support personnel only for direct maintenance of the Avaya environment.

   B. Would it be practical to adopt a new civil service class to perform this work? Explain. No. This request will address a temporary need for special skills.

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

   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]
Signature of Departmental Personal Services Contract Coordinator

Kendall Gary  - 581-4086
Print or Type Name: Telephone Number

1 South Van Ness, 2nd Floor
San Francisco, CA 94103
Address:
This will serve as the 30-Day Notice to Unions for the attached PSC approval request.

Thank you.

Sheila A Maxwell
Department of Technology
Contracts & Procurement
(415) 581-4088
Read: PSC Review
Pam Covington [pcovington@ifpte21.org]

Sent: Wednesday, June 27, 2012 10:50 AM
To: Maxwell, Sheila

Your message was read on Wednesday, June 27, 2012 10:50:39 AM (GMT-08:00) Pacific Time (US & Canada).
PERSONAL SERVICES CONTRACT SUMMARY

DATE: June 25, 2012

DEPARTMENT NAME: Department of Economic & Workforce Development
DEPARTMENT NUMBER 21

TYPE OF APPROVAL: ☒ REGULAR (OMIT POSTING _________ )

TYPE OF REQUEST: INITIAL REQUEST ☐ MODIFICATION (PSC# 3013-11/12)

TYPE OF SERVICE: Professional Consulting Services – One Stop and Training Account coordination

FUNDING SOURCE: Grant Funds (Workforce Investment Act) and General Fund

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<td>$49,900</td>
<td>$100,000</td>
<td>$149,900</td>
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PSC Duration: 8/24/11-8/30/12

Total PSC Duration: 8/24/11-12/31/13

1. DESCRIPTION OF WORK

A. Concise description of proposed work: The consultant will increase capacity with OEWD grantees who operate the City’s One Stop Career Link Centers. Contractor’s work will be focused on sector based training, research, including sectors in demand and performance of training providers currently on the State’s Eligible Training Provider listing. Consultants will conduct technical assistance and training with One-Stop staff, Sector Academy Staff, and/or OEWD staff on training, best practices, high performing training providers, and growth industries/sectors to ensure that all parties can assist Workforce Investment Act program participants to make informed choices about training options. The consultants will assist in overseeing the implementation of any program or operational changes and may also facilitate partnerships.

B. Explain why this service is necessary and the consequences of denial:
The Department has been awarded competitive grants in the last 2 years to build the Sector Academies, resulted in a significant increase in the number of Workforce Development programs and grantees in the last 12 months. Because of the expanded services offered through the City’s One-Stop system and Sector Academies, there is a short-term need for someone with experience in coordinating and providing in-depth technical assistance to the growing workforce system of providers. An inefficient workforce system would result in an unfocused service model and the inefficient expenditure of funds. Findings of non-compliance in any of the programs could result in a possible loss of funding from the sources thus jeopardizing the continuation of the associated workforce services provided to the public.

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):

Some assistance was offered by the same contractor in FY 10-11 with a focus on implementing two new One Stops in the City with community organizations who had not previously provided those services. Alignment of large scale sector-based initiatives is a new project.

D. Will the contract(s) be renewed: unknown

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

Union Name ___________________________ Signature of person mailing/faxing form ___________________________ Date ______________

Union Name ___________________________ Signature of person mailing/faxing form ___________________________ Date ______________

RFP sent to ___________________________ on ___________________________ Date ___________________________ Signature ___________________________

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3013-11/12

STAFF ANALYSIS/RECOMMENDATION: Original Received 7/25/12
Revision Received 7/31/12

CIVIL SERVICE COMMISSION ACTION:

0024

PSC FORM 1 (9/96)
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise:
      Extensive experience with workforce development best practices implemented in other local areas with similar challenges. Extensive knowledge and experience with developing internal programmatic controls; high level of program experience; and significant high-level experience in assessing and addressing system challenges. In depth knowledge of legal requirements of programs to ensure compliance at all levels of service.

   B. Which, if any, civil service class normally performs this work?
      0923 – Manager II,
      0931 – Manager III

   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:
      Assessment, alignment and implementation between multiple workforce programs including new WIA sector-based initiatives is a task that the current staff within OEWD are unable to undertake at this time because of the vacancies that currently exist. A consultant is needed to assist with the research and education phases as we initiate this process. As vacancies are filled, the consultant will involve the new managers in the process so that work can be transferred over, as appropriate, to permanent staff. The department is currently in the process of filling vacancies but the work cannot be delayed until that time because of the grant term constraints.

   B. Would it be practical to adopt a new civil service class to perform this work? Explain.
      No, because this is an immediate short term need.

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?
      Yes ☒   No ☐
      • 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.

   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

Merrick Pascual
Print or Type Name

701-5511
Telephone Number

1 South Van Ness Ave, 5th Floor
San Francisco, CA 94102
Address

PSC FORM 1 (9/96)
Good Morning,

Attached please find an update PSC modification request -- the original was faxed to MEA on 6/25/12. I inadvertently reference the wrong approved PSC number on the first page of the mod request sent on 6/25 though I did attach the correct original PSC form 1 in that fax. Please excuse the typo and let me know if you have any questions.

Thanks!
-Kris

DOC586.PDF
Kris Damalas
Contracts and Performance Director
City and County of San Francisco
Office of Economic and Workforce Development
Email: kristine.damalas@sfgov.org
Ph: 415-581-2334
Fax: 415-581-2317
Website: www.workforcedevelopmentsf.org
Transmission Report

This document: Confirmed
(reduced sample and details below)
Document size: 8.5"x11"

CITY AND COUNTY OF SAN FRANCISCO
EDWIN M. LEE, MAYOR
OFFICE OF ECONOMIC AND WORKFORCE DEVELOPMENT
RHONDA SIMMONS, DIRECTOR OF
WORKFORCE DEVELOPMENT

Facsimile Transmittal

To: MEA
Fax: 415-988-7077

From: Kris Damales
Date: 6/25/12

Re: PSC Summary for review

Message:

Attached find a PSC Modification Summary for review in addition to the original approved PSC Summary. I've also attached two recent press releases which detail additional limited duration funding that the department was recently awarded and will need integrating in the division's programming with the help of the consultants identified. Should you have any questions or concerns, please don't hesitate to contact me.

Thanks,
Kris Damales
Contract Manager
Office of Economic and Workforce Development – Workforce Development Division
Ph: 415-981-2304
Fax: 415-981-2317
Email: Kristine.damales@sfgov.org

Total Pages Scanned: 9
Total Pages Confirmed: 9

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Abbreviations:
HS: Host send
HR: Host receive
WS: Waiting send
PL: Polled local
PR: Polled remote
MP: Mailbox print
RP: Report
FF: Fax Forward
PN: Pending
CP: Completed
FA: Fail
TU: Terminated by user
TS: Terminated by system
G3: Group 3
EC: Error Correct
City and County of San Francisco

Department of Human Resources

PERSONAL SERVICES CONTRACT SUMMARY

DATE: July 19, 2011

DEPARTMENT NAME: Department of Economic & Workforce Development

DEPARTMENT NUMBER: 21

TYPE OF APPROVAL: ☑ EXPEDITED ☐ REGULAR

(OMIT POSTING ________)

☐ CONTINUING ☐ ANNUAL

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

TYPE OF SERVICE: Professional Consulting Services - One Stop and Training Account coordination

FUNDING SOURCE: Grant Funds (Workforce Investment Act) and General Fund

PSC AMOUNT: $49,900

PSC DURATION: 8/24/11 - 8/30/12

1. DESCRIPTION OF WORK

A. Concise description of proposed work:
The consultant will increase capacity with OEWD grantees who operate the City’s One Stop Career Link Centers. Contractor’s work will be focused on sector based training research, including sectors in demand and performance of training providers currently on the State’s Eligible Training Provider listing. Consultants will conduct technical assistance and training with One-Stop staff, Sector Academy Staff, and/or OEWD staff on research, best practices, high performing training providers, and growth industries/sectors to ensure that all parties can assist Workforce Investment Act program participants to make informed choices about training options. The consultant will assist in overseeing the implementation of any program or operational changes and may also facilitate partnerships.

B. Explain why this service is necessary and the consequences of denial:
The Department has been awarded competitive grants in the last year to build the Sector Academics, resulting in a significant increase in the number of Workforce Development programs and grantees in the last 12 months. Because of the expanded services offered through the City’s One-Stop system and Sector Academics, there is a short-term need for someone with experience in coordinating and providing in-depth technical assistance to the growing workforce system of providers. An inefficient workforce system would result in an unfocused service model and the inefficient expenditure of funds. Findings of non-compliance in any of the programs could result in a possible loss of funding from the sources thus jeopardizing the continuation of the associated workforce services provided to the public.

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):
Some assistance was offered by the same contractor in FY 10-11 with a focus on implementing two new One Stops in the City with community organizations who had not previously provided those services. Alignment of large scale sector-based initiatives is a new project.

D. Will the contract(s) be renewed:
Unknown at this time

2. UNION NOTIFICATION:

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

MEU

Union Name

Signature of person mailing/faxing form

Date

Union Name

Signature of person mailing/faxing form

Date

RFP sent to

Union Name, on

Date

Signature

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3013 - 11/12

Approval Date: 8/24/11

By:

Micki Callahan, Human Resources Director

PSC FORM 1 (9/96)
3. **DESCRIPTION OF REQUIRED SKILLS/EXPERTISE**
   A. Specify required skills and/or expertise:
   Extensive experience with workforce development best practices implemented in other local areas with similar challenges. Extensive knowledge and experience with developing internal programmatic controls; high level of program experience; and significant high-level experience in assessing and addressing system challenges. In-depth knowledge of legal requirements of programs to ensure compliance at all levels of service.
   B. Which, if any, civil service class normally performs this work?
      0923 - Manager II,
      0931 - Manager III
   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:
   Assessment, alignment and implementation between multiple workforce programs including new WIA sector-based initiatives is a task that the current staff within OEWD are unable to undertake at this time because of the vacancies that currently exist. A consultant is needed to assist with the research and education phases as we initiate this process. As vacancies are filled, the consultant will involve the new managers in the process so that work can be transferred over, as appropriate, to permanent staff. The department is currently in the process of filling vacancies but the work cannot be delayed until that time because of the grant term constraints.
   B. Would it be practical to adopt a new civil service class to perform this work? Explain.
   No, because this is a one-time research, design and implementation/education process.

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.
      Please see attached explanation
   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]

Signature of Departmental Personal Services Contract Coordinator

Merrick Pascal
Print or Type Name

(415) 701-5511
Telephone Number

1 Dr. Carlton B. Goodlett Place, #448
San Francisco, CA 94102
Address
PERSONAL SERVICES CONTRACT SUMMARY

TYPE OF SERVICE: Professional Consulting Services – One Stop and Training Account coordination

PSC AMOUNT: $49,900  PSC DURATION: 8/8/11-8/30/12

Explanation concerning question 5B

Through the process of providing technical assistance on the items noted below, the consultant will provide training so that similar situations and questions can be addressed in the future by the departmental staff. The consultant will work with OEWD, One-Stop staff, and Sector Academy staff to design/re-design elements of the service delivery model, operations, administration and oversight. This may include, but is not limited to:

- Changes to the service delivery model and client flow including any program improvements especially those related to sector focused training informed by consultant’s research.
- Recommendations on training/retraining staff at the One-Stop, Sector Academies, and other Workforce program grantees.
- Recommendations to OEWD on changes in administration, performance standards and/or policies that would result in improved oversight of workforce system providers and improved outcomes.

Training/Technical Assistance/Facilitation

As identified by the assessment and recommendations, the Consultants will conduct technical assistance and training with One-Stop staff, Sector Academy staff, other workforce grantees, and/or OEWD staff. Such technical assistance/training may include 1:1 consultation, group training, facilitating retreats, peer learning activities, and producing written training materials.

Staff benefiting from training will be Workforce managers at multiple levels (classifications 0922, 0923, 0932) as well as program oversight staff (classification 9775).
FOR IMMEDIATE RELEASE:
Thursday, June 21, 2012
Contact: Mayor’s Office of Communications, 415-554-6131

*** PRESS RELEASE ***

MAYOR LEE ANNOUNCES NEW FUNDING FOR TECHSF INITIATIVE TO TRAIN S.F. RESIDENTS FOR HIGH TECH JOBS
U.S. Department of Labor Grants Provide Additional Funds for San Franciscans to Receive Job Training for New Economy

San Francisco, CA—Mayor Edwin M. Lee today announced that the U.S. Department of Labor (DOL) awarded San Francisco with an additional $3 million in Workforce Innovation grants to train and reskill San Francisco residents for the City’s growing number of technology and IT jobs. The City’s TechSF Initiative received $5 million from DOL in March.

“Making sure that San Franciscans receive the skills and training they need to compete in the 21st century job market is a cornerstone of my economic strategy and critical to our City’s economic recovery,” said Mayor Lee. “I thank the Obama Administration for investing in public-private partnerships that strengthen workforce training and bridge the skills gap between our residents and the good paying jobs that many of our tech companies are creating right here in San Francisco.”

“The Workforce Innovation Fund was created to cultivate and test innovative approaches to workforce training and encourage the replication of evidence-based practices in the workforce development field,” said Secretary of Labor Hilda L. Solis. “Developing new and creative strategies and expanding existing programs we know work will help make the workforce system more effective to unemployed Americans and employers looking for qualified employees.”

The DOL Workforce Innovation Fund, in part, focuses on partnerships with specific industry sectors to develop programs to provide current and future job skill needs and the grants help develop the most effective strategies in workforce development. San Francisco was one of only 26 grant recipients nationwide.

Mayor Lee launched the TechSF initiative in March. The new $3 million funding will pilot the TechSF—Workforce Innovation project to transform workforce service delivery by leveraging and building upon San Francisco’s tech industry and TechSF Initiative. TechSF—Workforce Innovation uses best practices and pilots technological innovations and non-traditional workforce training methods in the IT and digital media sectors to bridge the current skills gap. The initiative will be replicable beyond the IT sector; relevant to other labor markets throughout and beyond the regional economy; and will diversify the workforce.

The City will work with industry employers to identify job needs—including mentoring, internships, interviews, curriculum development, and co-teaching.

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FOR IMMEDIATE RELEASE:
Thursday, March 8, 2012
Contact: Mayor’s Office of Communications, 415-554-6131

*** PRESS RELEASE ***

MAYOR LEE LAUNCHES TECHSF INITIATIVE TO TRAIN S.F.
RESIDENTS FOR HIGH TECH JOBS WITH $5 MILLION FEDERAL
WORKFORCE TRAINING GRANT

U.S. Department of Labor Awards San Francisco Mayor Grant to Train & Reskill City Residents to Fill
Growing Number of High-Tech Jobs

San Francisco, CA—Mayor Edwin M. Lee today launched TechSF to train and reskill San Francisco residents for the City’s growing number of technology and IT jobs, announcing a $5 million grant from the U.S. Department of Labor’s Technical Skills Training Grants program to jumpstart funding for the City’s major new workforce training initiative. Mayor Lee was joined at the announcement at Year Up Bay Area by members of the Board of Supervisors, U.S. House Democratic Leader Nancy Pelosi’s Office and partners from technology companies and workforce training organizations.

“Ensuring San Francisco residents have the skills and training they need to work in our City’s growing number of high tech jobs is a cornerstone of our economic strategies and critical to making sure our economic recovery reaches every neighborhood of our City,” said Mayor Lee. “This major grant from the Department of Labor for our TechSF initiative will bring City residents, technology companies and our workforce training partners together to train and reskill our residents to ‘win the future’ for San Francisco, in the words of President Obama. I want to thank the President, Secretary Solis and Leader Pelosi for strengthening public-private partnerships and investing in workforce training for our residents so that they can get the good jobs so many of our tech companies are creating right here in San Francisco today.”

“Securing this grant and investing in TechSF will train San Franciscans for the jobs of tomorrow; spur our fast-growing IT industry; strengthen and create new career and educational pathways for San Francisco’s workforce; and meet the needs of entrepreneurs and businesses large and small,” said Democratic Leader Nancy Pelosi. “With this grant, we can put more people to work in high-growth, high-tech occupations, and we can ensure unemployed San Franciscans have the skills and background necessary to secure and keep good-paying jobs.”

“The federal grant awards announced today will provide U.S. workers with the training they need to succeed in the high tech, high-growth jobs of the future,” said U.S. Labor Secretary Hilda Solis. “Developing a strong and vibrant workforce that fits the needs of American businesses is critical to forming an America built to last.”

In San Francisco, the TechSF grant will serve local jobseekers that are currently underrepresented in the IT sector, especially the long-term unemployed. In addition to providing education, training and job placement assistance, the grant will enhance sector partnerships, create new pathways to high-wage and high-growth careers, and integrate San Francisco’s education, training and industry efforts in the local Information Technology sector.
The San Francisco Office of Economic and Workforce Development (OEWD) partnered with WestEd, IBM, AT&T, City College of San Francisco and a consortium of San Francisco-based employers and community-based organizations to apply for this grant to create the TechSF Initiative to raise the technical skill of San Francisco workers.

The TechSF initiative is based on a highly successful program model, which includes building career pathways and training for in-demand skills in the rapidly changing technology industry. The partnership targets two groups of workers. One target group is local workers seeking jobs in the technology sector, at least 75 percent of whom will have been unemployed for longer than six months. The project intends to train and place more than 300 workers in this category into positions paying $25 - $50 per hour. The project’s employer consortium will help recruit participants, provide internship and work experience opportunities, and interview and hire participants who successfully complete the program.

The other target group is more than 1,400 employees in the San Francisco offices of IBM and AT&T who need training to remain competitive in their current jobs and advance into more highly skilled positions. Employees trained through this program currently earn an average hourly wage of $28 - $60 per hour. The TechSF initiative will result in 97 percent of all participants earning an industry recognized credential or degree, and 93 percent working in IT jobs after they complete training.

WestEd will serve as the project manager partner for this grant. WestEd is a national non-partisan, not-for-profit agency headquartered in San Francisco. Since 1966, WestEd has developed research, products, and policy for improving learning and human development.

This workforce development project addresses the real needs of many San Franciscans,” said WestEd CEO Glen Harvey. “We’re proud and excited to collaborate with such innovative partners to increase career education opportunity in our community.”

Other companies participating in the grant program and initial TechSF initiative include AT&T, IBM Corporation, Riverbed Technology, Sega, CBS Interactive, UCSF Medical Center, Artisan Creative, CAL Insurance, The Exploratorium, Responsys, MicroMenders, Mozilla, Send Me, salesforce.com and Atlassian.

The tech community in San Francisco is proud to play a leading role in making sure City residents get the skills and training they need to move into the City’s growing number of tech jobs, and this grant is a real boost to our collective efforts,” said Chair of the San Francisco Citizens Initiative for Technology & Innovation (sf.citi) and Special Partner of SV Angel Ron Conway. “sf.citi is looking forward to a continued partnership with Mayor Lee and the City’s TechSF initiative to create good jobs and focused IT training programs to employ City residents.”

Creating apprenticeships and job training initiatives – whether for young people coming out of high school and college or for those in need of reskilling in the middle of their careers – are critical parts of Mayor Lee’s 17-Point Economic Plan for Good Jobs & Opportunity for San Francisco.

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PERSONAL SERVICES CONTRACT SUMMARY

DATE: 6/14/12

DEPARTMENT NAME: Department of Human Resources  DEPARTMENT NUMBER  33

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

TYPE OF REQUEST:
☐ INITIAL REQUEST  ☑ MODIFICATION (PSC# 3046-1112)

TYPE OF SERVICE: Contract management advisory services

FUNDING SOURCE: General Fund

Original Amount: $49,500  PSC DURATION: 01/01/12 – 12/31/12
Modification #1 Amount: $50,000  PSC DURATION: 09/01/12 – 06/30/13
Total Amount: $99,500  PSC DURATION: 01/01/12 – 06/30/13

1. DESCRIPTION OF WORK
   A. Concise description of proposed work:
   The Contractor shall provide contract management advisory and quality assurance services to ensure compliance with City requirements and timely, defensible execution of contracting processes. Services shall include guidance on pre-solicitation, solicitation, evaluation, and negotiations, as well as post-contract management issues.

   B. Explain why this service is necessary and the consequences of denial:
   The Department has several high-risk, multi-million dollar contracts it needs to administer in over the next two years. The Department does not currently have in-house contract management expertise to navigate the City's complex contracting process to ensure the Department's compliance with City requirements and to assure timely, justifiable results. If approval is denied, the Department may not be able to execute contracts in a timely, effective manner, which may result in delays.

   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):
   Contract management advisory services have been provided by the Controller's Office in the past.

D. Will the contract(s) be renewed:
   Subject to evaluation of contract performance and Department needs.

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

   Union Name
   Signature of person mailing/faxing form
   Date

RFP sent to Union Name, on Date

Signature

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3046-1112

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
   A. Specify required skills and/or expertise:
The Contractor should have experience: developing, administering, and evaluating City contracting requirements, policies and procedures and best practices; negotiating and managing City contracts with successful results; and providing technical assistance and advice to City departments on professional services contracting issues.
   B. Which, if any, civil service class normally performs this work?
   1825 Principal Administrative Analyst II.
   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:
The services are as-needed and intermittent in nature and require highly specialized expertise. The level of effort is estimated to be less than 0.30 FTE on an annualized basis.
   B. Would it be practical to adopt a new civil service class to perform this work? Explain.
The level of effort is estimated to be less than 0.30 FTE on an annualized basis.

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.
   
   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?
   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
Print or Type Name

415-557-4944
Telephone Number

1 S. Van Ness, 4th Floor
San Francisco, CA 94103
Address
Hello,

Attached is a revised PSC modification:

Thanks,

Brent Lewis
Director of Finance and IT
Department of Human Resources
City and County of San Francisco
(415) 557-4944

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Hello,

DHR is seeking L21 review and approval for the attached PSC Modification:

Thanks,

Brent Lewis
Director of Finance and IT
Department of Human Resources
City and County of San Francisco
(415) 557-4944
PERSONAL SERVICES CONTRACT SUMMARY

DATE: 06/19/2012 (30-day Notice)  
07/26/2012 (to DHR)

DEPARTMENT NAME: San Francisco Public Utilities Commission  
DEPARTMENT NUMBER: 40

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

CONTINUING ☐  
ANNUAL ☐

TYPE OF REQUEST:  
☐ INITIAL REQUEST  
✓ MODIFICATION (PSC# 3116-09/10)

TYPE OF SERVICE: Hosting production and distribution of electronic newsletter – CS-152(I)

FUNDING SOURCE: SFPUC Communications Division Operating Funds

Original Amount: $49,000  
PSC Duration: 09/01/2010 to 08/31/2013

Modification Amount: $49,000  
PSC Duration: 08/20/2012 to 08/31/2013

Total Amount: $98,000  
Total PSC Duration: 09/01/2010 to 08/31/2013

1. DESCRIPTION OF WORK

A. Concise description of proposed work:
Hosting, production and distribution of six bi-monthly issues of digital Currents (the SFPUC’s electronic external newsletter) annually.

B. Explain why this service is necessary and the consequences of denial:
Our electronic newsletter is an extremely important component of the SFPUC’s external communications to rate payers and other stakeholders throughout the Bay Area. Denial would have a negative, limiting impact on the SFPUC’s external communications efforts.

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 been provided in the past by PSC No. 3116-09/10. This modification request is to extend that contract for an additional year per the original terms of the agreement.

D. Will the contract(s) be renewed: Maybe.

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

L21  
L1021  
Shamica Jackson  
Signature of person mailing/faxing form

06/19/2012 (30-day Notice)  
07/26/2012 (to DHR)

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3116-09/10
STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:
3. **DESCRIPTION OF REQUIRED SKILLS/EXPERTISE**
   A. Specify required skills and/or expertise:
   
   See Supplemental Attachment A.
   
   B. Which, if any, civil service class normally performs this work?
   **This work requires Internet-based and database technologies as well as HTML (web-based) expertise that the SFPUC is currently pursuing but does not yet possess. Once we acquire this technology and skills, the work could be performed by 1051 Business Analyst and/or 5322 Graphic Artist.**
   
   C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
   Yes. This is crucial, as the SFPUC does not yet possess the web, staging, template or database technologies or HTML skills capable of performing the above-referenced required services/functions at a high-end, large user-base level.

4. **WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM**
   A. Explain why civil service classes are not applicable:
   The SFPUC does not possess the Internet, staging, template or database technologies or HTML skills to support production of a high-end digital newsletter. Once acquired, we can transition to in-house production.
   
   B. Would it be practical to adopt a new civil service class to perform this work? Explain.
   It would not be practical to adopt a new civil service class at this time because the SFPUC does not yet possess the technical capacity/infrastructure to produce a quality digital newsletter in-house.

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

   B. Will the contractor train City and County employees?
      
      ✗ No

   • Describe the training and indicate approximate number of hours.
   
   **Staff will need to be trained to consistently build high-end HTML-based newsletter pages from scratch (and to maintain and troubleshoot said pages). Training for and mastering these skills will take several months.**
   
   • Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained.
   **1051 Business Analyst and/or 5322 Graphic Artist (approximate number not yet known).**

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

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

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

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

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

[Signature]

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

D.E. SCOTT

PSC FORM 1 (9/96)
3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE
A Specify required skills and/or expertise:

- Web hosting technology capable of supporting a high-end, interactive electronic newsletter, including automated unsubscribe functions, flash technology and user-friendly navigation.

- Template technology and layout/design expertise that will facilitate consistent high-end electronic newsletter production.

- Staging technology and expertise that supports production of a high-end, interactive, link and visual technology rich electronic newsletter.

- Database technology and expertise supporting the ongoing compilation and management of a growing user distribution list of 35,000+, including the ability to regularly and instantly purge tens of thousands of duplicate email addresses from the list, as well as create and distribute high-end, interactive e-blasts to the list.

- Generation of bi-monthly e-newsletter traffic analytics and analysis.

- Ability to manage numerous subcontractors, as necessary, to ensure that each of the above services is delivered consistently, accurately and on-time.

- Ability to consistently build high-end HTML-based newsletter pages from scratch (and to maintain and troubleshoot said pages).
1. For **Engineering Resources Committee**: Attached for your review is the PSC1, Summary Form for CS-152 (I), Hosting production and distribution of electronic newsletter, modification request for $49,000.

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

3. Thirty-day Union notification required? If no, please explain. **Yes, the 30-day notice expired on July 19, 2012.**

4. For **August 20, 2012 Commission Meeting** at 2:00 PM, City Hall Room 400.

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Shamica L. Jackson  
San Francisco Public Utilities Commission  
Contract Administration Bureau  
525 Golden Gate Avenue, 8th Floor  
San Francisco, CA 94102  
voice: 415-554-0727  
fax: 415-554-3225  
e-mail:sjackson@sfwater.org  
[Please consider the environment before printing this email]