#### City and County of San Francisco

#### London Breed Mayor



#### Department of Human Resources

#### Micki Callahan Human Resources Director

Date: September 4, 2020

To: The Honorable Civil Service Commission

Through: Micki Callahan

**Human Resources Director** 

From: Cynthia Avakian, AIR

Melissa Ng, CON Lorna Garrido, DAT Jenny Collins, ECN Alexander Burns, DPW Amy Nuque, MTA

Bill Irwin / Daniel Kwon, PUC

Joan Lubamersky, GSA Jacquie Hale, DPH Kevin R. Quan, ART Genie Wong, POL

Subject: Personal Services Contracts Approval Request

This report contains nineteen (19) personal services contracts (PSCs) in accordance with the revised Civil Service Commission (CSC) procedures for processing PSCs that became effective on November 5, 2014.

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 Fiscal Year 20/21 to date:

Total of this Report	YTD Expedited Approvals FY2020-2021	Total for FY2020-2021
\$133,009,500	\$36,619,916	\$504,383,490

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Published on Personal Services Request Database (http://apps.sfgov.org/dhrdrupal)

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#### **POSTING FOR**

September 21, 2020

#### PROPOSED PERSONAL SERVICES CONTRACTS - REGULAR

<b>Commission</b> 2020-09-21	Hearing Date	APPLY				
PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
44485 - 20/21	AIRPORT COMMISSION	\$150,000.00	San Francisco International Airport ("SFO" or "Airport") requires the assistance from the San Mateo County Mosquito and Vector Control District ("SMCMVCD") to perform mosquito abatement services on the Airport West of Bayshore property (on the west side of U.S. Highway 101). SMCMVCD develops and implements mosquito surveillance and control activities with its own personnel, materials and equipment at the site. As part of an integrated mosquito control approach, district personnel will advise the Airport if mosquito breeding habitat can be eliminated or reduced without the use of pesticides. Since this protected wetland area is overgrown with dense vegetation making it impenetrable on foot, treatment in this area has to be conducted by helicopter.	October 1, 2020	September 30, 2025	REGULAR
44699 - 19/20	AIRPORT COMMISSION	\$2,500,000.00	San Francisco International Airport ("SFO" or "Airport") requires the services of San Mateo County for dispatch of emergency medical responders (paramedics/ambulance services) and fire responders to the Airport. San Mateo County communication centers dispatches these responders to the Airport and the Airport will reimburse the County for the Airport's prorata share of dispatch calls made as well as the cost of fire department responders. San Mateo County paramedic/ambulance contractor, American Medical Response, invoices the patients and/or the patients' health insurance providers for the paramedic/ambulance costs.	September 21, 2020	June 30, 2027	REGULAR
43580 - 19/20	) CONTROLLER	\$75,000,000.00	Due to the current COVID-19 pandemic, the City is offering COVID-19 testing via CityTestSF at two locations, Pier 30/32 and SOMA, as well as mobile testing for adults residing in San Francisco and essential workers serving San Francisco. End-to-end testing services are currently provided by Color Genomics, Inc. and/or by One Medical under emergency contracting authority. DPH, through an RFQ solicitation by the Controller's Office, is seeking Contractor(s) that will provide registration, scheduling, results delivery; specimen collection; testing/laboratory services; billing; and project management/integration.	September 1, 2020	September 3, 2023	REGULAR
42732 - 20/21	DISTRICT ATTORNEY	\$350,000.00	The expertise of the professionals sought is unique, unrepresented, and greatly needed by the partners in the Safety and Justice Challenge (SJC). SJC partners, including the District Attorney's Office, Adult Probation Department, Sheriff's Office, and others, needs individuals that can conduct strategic planning, training, and technical assistance and possess expertise in reentry and criminal justice. The goal of the project is to launch a Safety and Justice Challenge Fellowship in order to provide training, coaching and technical assistance to the District Attorney's Office staff, Adult Probation Department, Sheriff's Office and other City department staff. The fellowship would support at least two individuals who identify as people with lived experience of incarceration and who have a deep understanding of the impact of racial disparities in the criminal justice system.	September	April 30, 2023	REGULAR
49616 - 19/20	DECONOMIC AND WORKFORCE DEVELOPMENT	\$141,500.00		July 1, 2020	June 30, 2024	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work  The work consists of planning and implementing various marketing, branding and promotional projects for Legacy Businesses, including the creation of a new Legacy Business Program website.		PSC Estimated End Date	Type of Approval
42079 - 19/20	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$3,500,000.00	The Potrero Joint Development Project is the modernization and expansion of the SFMTA Potrero Yard bus maintenance division, and the addition of housing above this bus facility, all built within one building. Under this Joint Development project delivery approach, a Lead Master Developer will initially work with the City during a non-binding Pre-Development Agreement (PDA) phase to develop the design for this very unique building structure with vertically integrated combination of uses. Services to be performed by the Lead Master Developer during the PDA phase will include design for the fully integrated building to approximately 40% - 50% design. Other services to be provided by the Lead Master Developer during the PDA phase that will interface with the building design process include cost estimating and scheduling. Once this suite of services is underway, the Lead Master Developer will work with the City to arrive at mutually agreeable technical, financial, legal, real estate and commercial terms that will be further developed into the final terms of a master Project Agreement for the complete delivery of the remaining design, construction and delivery of the project. It should be noted that the project will not pay any monies to the Lead Master Developer for providing these services during the PDA phase. The purpose of submitting this form was to provide early notification to the unions and the Commission. The estimated value of this Professional Services Contract intends to represent one possible value for a termination fee, should there be a need to terminate prior to reaching mutual agreement with the developer on final terms during the PDA phase. At which time, a termination fee paid to the developer would secure the design product for further advancement. Otherwise, no monies will be paid during the PDA phase.		December 1, 2026	REGULAR
40423 - 19/20	MUNICIPAL TRANSPORTATION AGENCY	\$6,000,000.00	The contractor will perform technical work to:  •Identify transit alignments for specified transit corridors  •Advance the most promising of these alignments to a 5-10% level of design requiring expertise in engineering and architectural disciplines including geotechnical, tunnel, structural, rail, station design, life safety, and project scheduling  •Estimate alignment costs and benefits  •Recommend an implementation strategy.	February 1, 2021	February 1, 2026	REGULAR
41046 - 19/20	PUBLIC UTILITIES COMMISSION	\$1,680,000.00	Contractor shall develop and implement a comprehensive state lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters and other materials; and representing the SFPUC before the California State Legislature, the Governor's office, regulatory agencies, industry associations and other entities as needed. This contract also allows for as-needed political and policy communications subcontractors relevant to legislative and regulatory activities.	March 1, 2021	February 28, 2026	REGULAR
48083 - 20/21	PUBLIC UTILITIES COMMISSION	\$193,000.00	To provide preventative maintenance and unlimited emergency repair service for three Thermo Electron North America-manufactured Ion chromatography systems owned and operated by the SFPUC at the Millbrae Drinking Water Laboratory. Service includes one annual preventative maintenance, unlimited emergency repair, and includes all parts, shipping, and travel.	July 1, 2017	June 30, 2021	REGULAR

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### Posting For September 21, 2020

### Proposed Modifications to Personal Services Contracts

Commission He 2020-09-21		APP	LY					
PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
31841 - 18/19 - MODIFICATIONS		GENERAL SERVICES AGENCY - CITY ADMIN ADM	\$75,000	\$167,000	The Digital Services Division promotes the development of new digital services to help meet the needs of all who use City and County of San Francisco (CCSF) on line services. Digital Services relies on user research as a fundamental means of understanding each customer's story and needs, which informs the design of accessible and intuitive on line services. Vendor will create and coordinate a User Testing Program to help CCSF departments bring public input into the design of City services. Vendor will recruit, engage and compensate residents for user testing. Target users will include residents who are low income, English as Second Language speakers, seniors, and people with disabilities. Through this program, Digital Services will conduct user testing by testing its web products on members of these groups and use research results to make its products more accessible by members of these groups. Vendor will assess the program at regular intervals.	03/15/2019	07/01/2021	REGULAR
41793 - 18/19 - MODIFICATIONS		AIRPORT COMMISSION AIR	\$0	\$600,000	Provide technical support for the proprietary Airfield Lighting Control Monitoring System (ALCM) to ensure SFO Airfield lighting system meets operational airfield lighting compliance and Federal Aviation Administration (FAA) requirements. To maintain FAA compliance, this contract will require unlimited technical phone support during normal business hours, remote access to troubleshoot the proprietary ALCMS system through the internet connection, two on-site site visits per year to do ALCMS preventive maintenance which include system diagnostic and inspection to verify and optimize lighting system performance as well as optimization of hard drives and system calibration.	05/31/2025	06/30/2026	REGULAR
42645 - 18/19 - MODIFICATIONS		ECONOMIC AND WORKFORCE DEVELOPMENT ECN	\$270,000	\$510,000	Contractor will assist with the implementation of Healthy Retail SF, a City ordinance-mandated technical assistance program designed to increase access to healthy, affordable food. Contractor will be the lead consultant, supporting small businesses with space design, produce consulting, equipment needs, physical improvements and related activities. Contractor will also assist with client identification, conduct assessments of businesses, help create an	10/01/2020	06/30/2022	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					individual development plan (IDP), provide individualized technical support to business clients based on the IDP, help with tracking progress, and follow up with the client and modify the approach to best suit the client's needs. Contractor will provide direct and focused technical assistance, in individual and group settings if needed. Contractor will also provide equipment, materials, and supplies as outlined in the IDPs to the small businesses.			
35314 - 18/19 - MODIFICATIONS	,	GENERAL SERVICES AGENCY - PUBLIC WORKS DPW	\$250,000	\$350,000	Crane services to hoist materials from one location to another or to and from a roof. Services will differ based on project scope and complexity of the project. The weight and type of the materials to be craned, and the height and reach of the crane will need to be evaluated for each project. As a result, different types of cranes and operator requirements will be utilized throughout the course of this PSC. For example, some project may require vendor to have crane specifications and lifting capacities of 90 tons, 140 feet of height and 58 feet of reach.  Scope Change:  Add the following language to the original Description of Work: 'This contract shall be used exclusively for Crane Rental Services; no		03/16/2025	5 REGULAR
31212 - 15/16 - MODIFICATIONS	September 21, 2020	ECONOMIC AND WORKFORCE DEVELOPMENT ECN	\$0	\$900,000	other services shall be utilized.'  In an effort to improve the City and County San Francisco's business corridors, contractors will provide design and technical assistance for the SF Shines program to property and business owners to improve commercial façades, business interiors and provide accessibility upgrades. Contractors will develop design concepts and permit drawings necessary to obtain building approvals with the departments of Planning, Building Inspection and the Mayor's Office on Disability. Contractors will assist in the bidding and construction of façade and tenant improvement projects.		12/31/2022	2 REGULAR
49868 - 17/18 - MODIFICATIONS		PUBLIC UTILITIES COMMISSION PUC	\$2,700,000	\$9,700,000	The primary scope of work is to design conveyance infrastructure to alleviate flooding for a susceptible portion of the City. Work will consist of engineering design and construction support for San Francisco Public Utilities  Commission (SFPUC's) Folsom Area Stormwater Improvement Project. This includes up to 4,000 linear feet of approximately 12' inside diameter tunnel from Alameda and Treat Streets to approximately 7th and Berry Streets, launching and receiving shafts, and all related site investigation work (e.g., geotechnical and hazardous material).	08/01/2020	11/01/2023	3 REGULAR
44553 - 16/17 - MODIFICATIONS		PUBLIC UTILITIES	\$10,000,000	\$109,000,000	The San Francisco Public Utilities Commission (SFPUC) intends to award up to three (3) contracts ranging from \$15 million to \$35	03/01/2017	11/01/2025	5 REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
		COMMISSION PUC			million each to provide professional construction management (CM) services on an as-needed basis to support SFPUC staff on various Sewer System Improvement Program (SSIP) projects. These additional CM services will support existing staff on various SSIP projects including construction of the new headworks and biosolids digester facilities at the Southeast Water Pollution Control Plant (SEP) as well as major improvements and upgrades at other various wastewater treatment facilities. Additionally, as-needed CM staff may be required to support the SFPUC's Construction Management Bureau's organizational effort and may, for example, include adding on a short-term basis, Construction Engineer(s), Inspector (s), Safety Manager(s), and Cost Estimator(s).			
46323 - 16/17 - MODIFICATIONS		PUBLIC HEALTH DPH	\$30,000,000	\$30,700,000	The contractor will perform as-needed laboratory services for urinalysis testing for the San Francisco Department of Public Health Psychiatry Division's Office-Based Opioid Treatment (OBOT) Section, to include the Standard Test Panel certified by the State of California Health and Human Services Agency, Department of Health Services. Toxicology tests will include screening urine samples for the following toxins: Phenobarbital, Secobarbital, Pentobarbital, Butalbital, Morphine, Codeine, Hydrocodone, Hydromorphine,6-Acetylmorphine, Amphetamine, Methamphetamine, Methadone, Methadone Metabolite, Cocaine and Benzodiazepine.	07/20/2020	12/31/2025	5 REGULAR
					Scope Change:  In order to respond to the COVID-19 pandemic, the scope of the services will change to add laboratory services for COVID-19 testing, as well as other diagnostic tests which may be needed intermittently if the Department's laboratory services are required to focus chiefly on COVID-19 testing to meet surge demands. The previously approved specialized opioid testing services will continue.			
33586 - 18/19 - MODIFICATIONS	September 21, 2020	ARTS COMMISSION ART	\$0	\$200,000	MJM Management group will perform on-site market management for the Embarcadero Plaza art market. They will act as a liaison between the Arts Commission and currently licensed artists, provide event management support between permitted events and artists, provide security and deescalation services for artists and other members of the public, and assist with the general set-up and take-down of the market on Friday, Saturday, and Sunday.	07/01/2020	06/30/2021	. REGULAR
47260 - 14/15 - MODIFICATIONS		POLICE POL	\$200,000	\$1,100,000	The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and	11/01/2020	06/30/2022	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					refinement of predictive validity assessment procedures.			

**TOTAL AMOUNT \$43,495,000** 

# Regular/Continuing/Annual Personal Services Contracts

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>AIRPORT COMMISSION</u>	AIR	Dept. Code: AIR						
Type of Request: ✓ Initial	☐Modification	n of an existing P	SC (PSC #	)				
Type of Approval: □Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)				
Type of Service: Integrated Pest Manag	<u>gement</u>							
Funding Source: Airport Operating Funds PSC Amount: \$150,000 PSC Est. Start Date: 10/01/2020 PSC Est. End Date 09/30/2025								
<ul> <li>Description of Work         <ul> <li>A. Scope of Work/Services to be Contracted Out:</li> <li>San Francisco International Airport ("SFO" or "Airport") requires the assistance from the San Mateo County Mosquito and Vector Control District ("SMCMVCD") to perform mosquito abatement services on the Airport West of Bayshore property (on the west side of U.S. Highway 101). SMCMVCD develops and implements mosquito surveillance and control activities with its own personnel, materials and equipment at the site. As part of an integrated mosquito control approach, district personnel will advise the Airport if mosquito breeding habitat can be eliminated or reduced without the use of pesticides. Since this protected wetland area is overgrown with dense vegetation making it impenetrable on foot, treatment in this area has to be conducted by helicopter.</li> </ul> </li> <li>B. Explain why this service is necessary and the consequence of denial:         <ul> <li>SMCMVCD is the agency to provide mosquito and pest abatement districts in this area under California Health and Safety Code, Division 3, Chapters 1, Section 2000-2093 inclusive. The adult mosquitoes emerge from June through October and are efficient vectors of West Nile virus. With the threat of West Nile virus in this area, treatment work and surveillance is needed to be performed on a continual basis throughout the year. If denied, the mosquito population in this area may cause elevated concerns for infection.</li> </ul> </li> </ul>								
C. Has this service been provided in the attach copy of the most recently This is a new service, formerly ha	approved PSC.		e was provided un	der a previous PSC,				
D. Will the contract(s) be renewed? Yes, if this service is needed in the fu	ture.							
E. If this is a request for a new PSC in PSC by another five years, please Five year term to align with the c	explain why.	ars, or if your req	uest is to extend	(modify) an existing				
2. Reason(s) for the Request  A. Indicate all that apply (be specific	and attach any re	elevant supportir	ng documents):					
☑ Services that require resources that operator).	t the City lacks (e	e.g., office space,	facilities or equip	ment with an				

The City doesn't have civil servants with access to a helicopter for overhead application.

B. Explain the qualifying circumstances:

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Expertise in the implementation of integrated pest management programs that emphasize the use of least toxic methods to management the pest populations. In this case, the work requires the use of a helicopter for overhead application.
- B. Which, if any, civil service class(es) normally perform(s) this work? 3424, Integrated Pest Mgmt Specialst; 3425, Senior Integrated Pest Mgmt Sp; 5640, Environmental Spec;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the SMCMVCD will be providing the helicopter for the application.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

These services do not exist within the City departments.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
   Civil service classes do not have the specialized expertise for this work nor access to the equipment for overhead application.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, not at this time.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No. No training will be provided.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
  No.
- 7. <u>Union Notification</u>: On <u>07/13/2020</u>, the Department notified the following employee organizations of this PSC/RFP request: <u>Laborers</u>, <u>Local 261</u>; Prof & Tech Eng, <u>Local 21</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44485 - 20/21

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 **Civil Service Commission Action:** 

# **Receipt of Union Notification(s)**

From: dhr-psccoordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com

**To:** Cynthia Avakian (AIR); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; Cynthia Avakian (AIR); DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 44485 - 20/21

Date:Monday, July 13, 2020 1:07:01 PM

RECEIPT for Union Notification for PSC 44485 - 20/21 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 44485 - 20/21 for \$150,000 for Initial Request services for the

period 10/01/2020 - 09/30/2025. Notification of 30 days (60 days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

https://gcc01.safelinks.protection.outlook.com/?

url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F15310&data=02%7C01%7Cc ynthia.avakian%40flysfo.com%7C35a70b4a0f404a5e0e4008d827684c76%7C22d5c2cfce3e443d9a7 fdfcc0231f73f%7C0%7C0%7C637302676203878347&sdata=3a6bVDZ9sv8FrO870wjAAOiq %2BfwoUHaevno1joowBoA%3D&reserved=0 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>AIRPORT COM</u>	IMISSION AI	<u>R</u>	Dept. Code: AIR				
Type of Request:	☑Initial	□Modification	of an existing PS	SC (PSC #	)		
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	$\square$ (Omit Posting)		
Type of Service: Emergency	Support Servi	ces					
Funding Source: <u>Airport Ope</u> PSC Amount: <u>\$2,500,000</u>	erating Funds	PSC Est. Start Da	te: <u>09/21/2020</u>	PSC Est. End Date	e <u>06/30/2027</u>		
<ol> <li>Description of Work         <ul> <li>A. Scope of Work/Services</li> <li>San Francisco Internation of emergency medical res</li> <li>Mateo County communic the County for the Airpor responders. San Mateo Copatients and/or the patients</li> </ul> </li> </ol>	al Airport ("SF sponders (para ation centers of t's prorata sha ounty parame nts' health insi	O" or "Airport") Imedics/ambular dispatches these Ire of dispatch ca dic/ambulance of urance providers	nce services) and responders to the alls made as well ontractor, Ameri s for the paramed	fire responders to ne Airport and the as the cost of fire ican Medical Respo	o the Airport. San Airport will reimburse department onse, invoices the		
B. Explain why this service Failure to reimburse the ( patients to local hospitals casualties and non-compl response services in case	County for the and receive n liance with Fed	se services woul nutual aid suppo deral Aviation Ad	d prevent the Air rt for major mas: Iministration ("FA	s casualty incident	s. This would result in		
C. Has this service been po attach copy of the mo This is a new request.	st recently ap	proved PSC.			er a previous PSC,		
D. Will the contract(s) be Yes, if these services are r		Airport in the fu	ture.				
E. If this is a request for a by another five years, The term is consistent	please explair	n why.		·	odify) an existing PSC		
2. Reason(s) for the Reques  A. Indicate all that apply (		d attach any rele	evant supporting	documents):			
☑ Services required on an	as-needed, in	termittent, or po	eriodic basis (e.g.	., peaks in workloa	nd).		
B. Explain the qualifying ci These services are onl		n requested on	an as-needed ba	sis.			

#### 3. <u>Description of Required Skills/Expertise</u>

A. Specify required skills and/or expertise: Medical transport services in San Mateo County must be performed by the company selected by the county through a competitive process.

- B. Which, if any, civil service class(es) normally perform(s) this work? 9202, Airport Communications Disp; 9203, Sr Airport Communications Disp;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

City and County of San Francisco staff of any classification cannot perform these services for San Mateo County police, fire, and medical transport services.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
   City and County of San Francisco staff of any classification cannot perform these services for San Mateo County police, fire, and medical transport services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No , City and County of San Francisco staff of any classification cannot perform these services for San Mateo County police, fire, and medical transport services.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No. No training is planned for this service.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- 7. <u>Union Notification</u>: On <u>06/17/2020</u>, the Department notified the following employee organizations of this PSC/RFP request: SEIU 1021 Miscellaneous

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Cynthia Avakian</u> Phone: <u>650-821-2014</u> Email: <u>cynthia.avakian@flysfo.com</u>

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44699 - 19/20 DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020

Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: dhr-psccoordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com

To: Cynthia Avakian (AIR); Meyers, Julie (HSA); Ricardo.lopez@sfgov.org;

Basconcillo, Katherine (PUC); pcamarillo\_seiu@sbcglobal.net;

Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org;

ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); david.canham@seiu1021.org; jtanner940@aol.com; Cynthia Avakian (AIR);

DHR-PSCCoordinator, DHR (HRD)

Subject: Receipt of Notice for new PCS over \$100K PSC # 44699 - 19/20

**Date:** Wednesday, June 17, 2020 4:50:51 PM

RECEIPT for Union Notification for PSC 44699 - 19/20 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services

Contract (PSC) 44699 - 19/20 for \$2,500,000 for Initial Request services for the

period 09/21/2020 - 06/30/2027. Notification of 30 days (60 days for SEIU) is

required.

After logging into the system please select link below, view the information and

verify receipt:

https://gcc01.safelinks.protection.outlook.com/?

url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F15001&data =02%7C01%7Ccynthia.avakian%40flysfo.com%7Cfdc7595585484cc4e85d08d81 3194231%7C22d5c2cfce3e443d9a7fdfcc0231f73f%7C0%7C0%7C637280346499 831508&sdata=Q2EHgfrRyJg%2BmzlTVl40Nq0N%2FJ1v7DBii5xdfF8qzhE %3D&reserved=0

For union notification, please see

the TO: field of the email to verify receipt. If you do not see all the unions

you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You

should receive the email with all unions to the TO: field as intended

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>CONTROLLER</u>	- CON			Dept. Co	ode: <u>CON</u>
Type of Request:	☑Initial	$\square$ Modification	of an existing PS	SC (PSC #	)
Type of Approval:	□Expedited	☑Regular	□Annual	$\Box$ Continuing	☐ (Omit Posting)
Type of Service: <u>Professional</u>	Services				
Funding Source: <u>DPH</u> PSC Amount: <u>\$75,000,000</u>		PSC Est. Start Da	te: <u>09/01/2020</u>	PSC Est. End Dat	e <u>09/03/2023</u>
1. Description of Work  A. Scope of Work/Services  Due to the current COVID- 30/32 and SOMA, as well a  Francisco. End-to-end test under emergency contract Contractor(s) that will pro- services; billing; and project	19 pandemic, the standard services are sing services are sing authority. Wide registration	the City is offering for adults resing currently provice DPH, through and scheduling, re	ding in San Franc ded by Color Ger RFQ solicitation	cisco and essentia nomics, Inc. and/o by the Controller	I workers serving San or by One Medical 's Office, is seeking
B. Explain why this service As we are amidst a global virus. Providing San Franci bring down the number of of denial would cause mor hospital surge, more death	COVID-19 pand sco residents a hospitalization e people to be	demic, the City is nd essential wor ns and deaths as come infected w	committed to sl kers with free te well as safely re vith this deadly v	esting can help flat open the econom	tten the curve and y. The consequences
C. Has this service been pro attach copy of the mos N/A, new emergency s	st recently app	roved PSC.		as provided under	a previous PSC,
D. Will the contract(s) be re Possibly, until a vaccine is		subsequent imm	unity is acquired	l.	
E. If this is a request for a r by another five years, p not applicable		•	or if your reques	st is to extend (mo	odify) an existing PSC
2. Reason(s) for the Request A. Indicate all that apply (b)		attach any relev	ant supporting d	locuments):	
☑ Immediately needed ser emergency situations.	vices to addres	ss unanticipated	or transitional si	tuations, or servic	ces needed to address

B. Explain the qualifying circumstances:

As we are amidst a global COVID-19 pandemic, the City is committed to slowing down the spread of this deadly virus during these emergency situations. Providing San Francisco residents and essential workers with free testing can help flatten the curve and bring down the number of hospitalizations and deaths as well as safely reopen the economy.

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Medical laboratory technicians to collect and test specimen, nurses to perform the tests, project management office (PMO) to integrate/manage end-to-end testing services and reporting and ensure expedited results delivery in a variety of testing contexts.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1428, Unit Clerk; 2218, Physician Assistant; 2302, Nursing Assistant; 2320, Registered Nurse; 2328, Nurse Practitioner; 2402, Laboratory Technician I; 2403, Forensic Laboratory Technician; 2416, Laboratory Technician II; 2430, Medical Evaluations Assistant; 2489, Lab Svcs Mgr; 2830, Public Health Nurse;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, laboratories and personal protective equipment (PPE)

# 4. <u>If applicable</u>, what efforts has the department made to obtain these services through available resources within the City?

DPH is currently evaluating whether or not there is capacity and if makes operational sense for Nurses via the Registry and/or SFFD EMTs to provide specimen collection services. DPH may continue to use ZSFG labs and the Public Health lab to provide laboratory testing services but these labs would only be able to provide 33% of anticipated testing services needed.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  Current civil service classes do not possess expertise and/or the capacity for highly specialized virus testing.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, these services are short-term until a vaccine is created, and a sufficient immunity is acquired, and/or there is no longer a threat from this virus.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
   No. No, these services are short-term until a vaccine is created and a sufficient immunity is acquired, and/or there is no longer a threat from this virus.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>06/12/2020</u>, the Department notified the following employee organizations of this PSC/RFP request:

<u>Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); Teamsters, Local 856 Health Workers</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Melissa Ng Phone: 415-554-5109 Email: melissa.ng@sfgov.org

Address: <u>1 Dr. Carlton B. Goodlett Place, Room 306 San Francisco, CA 94102</u>

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>43580 - 19/20</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>melissa.ng@sfgov.org</u>

To: Ng, Melissa (CON); kcartermartinez@cirseiu.org; Sandeep.lal@seiu1021.me; Meyers, Julie (HSA);

Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); pcamarillo seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA);

david.canham@seiu1021.org; jtanner940@aol.com; WendyWong26@yahoo.com; wendywong26@yahoo.com;

tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org;

L21PSCReview@ifpte21.org; Ng, Melissa (CON); DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 43580 - 19/20

**Date:** Friday, June 12, 2020 2:27:24 PM

RECEIPT for Union Notification for PSC 43580 - 19/20 more than \$100k

The CONTROLLER -- CON has submitted a request for a Personal Services Contract

(PSC) 43580 - 19/20 for \$75,000,000 for Initial Request services for the period

09/01/2020 - 09/03/2023. Notification of 30 days (60 days for SEIU) is required.

After logging into the system please select link below, view the information and

verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15052 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: DISTRICT AT	Dept. Code: <u>DAT</u>					
Type of Request:	☑Initial	☐Modification	n of an existing P	SC (PSC #	)	
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Service: Safety and Justice Challenge Fellowship						
Funding Source: John D. 8 PSC Amount: \$350,000	& Catherine T.		dation ite: 09/01/2020	PSC Est. End Date	e <u>04/30/2023</u>	

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The expertise of the professionals sought is unique, unrepresented, and greatly needed by the partners in the Safety and Justice Challenge (SJC). SJC partners, including the District Attorney's Office, Adult Probation Department, Sheriff's Office, and others, needs individuals that can conduct strategic planning, training, and technical assistance and possess expertise in reentry and criminal justice. The goal of the project is to launch a Safety and Justice Challenge Fellowship in order to provide training, coaching and technical assistance to the District Attorney's Office staff, Adult Probation Department, Sheriff's Office and other City department staff. The fellowship would support at least two individuals who identify as people with lived experience of incarceration and who have a deep understanding of the impact of racial disparities in the criminal justice system.

- B. Explain why this service is necessary and the consequence of denial:
- San Francisco's SJC partners believe that the people closest to a problem are closest to the solution. SJC partners have been assigned the responsibility by the Board of Supervisors to identify and develop strategies to safely sustain jail population reductions as part of the closure of County Jail #4. SJC partners have identified technical assistance and training to local criminal justice agencies by individuals with lived experience of incarceration as a gap in achieving the racial equity and broader goals of the SJC. The project to develop an SJC Fellowship would support the racial equity and population reduction goals of the initiative by building the capacity of the DA's Office, Adult Probation and other partner organizations to deliver effective services to the community. If the PSC is denied, the SJC partners will not be able to effectively fulfill its mandated obligations to the community.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  n/a This service has not been provided in the past. This PSC is the initial request for this service.
- D. Will the contract(s) be renewed?

Contingent on funding availability and contractor performance.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.

n/a

#### 2. Reason(s) for the Request

- A. Indicate all that apply (be specific and attach any relevant supporting documents):
- ☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

☑ Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible (including situations where there is grant funding).

B. Explain the qualifying circumstances:

Compliance with grant objectives and deliverables requiring unique skills, qualifications and expertise.

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Deep understanding of the impact of racial disparities in the criminal justice system, of reentry, corrections, and the criminal justice system coupled with experience in strategic thinking, design and delivery of training and technical assistance and fellowship programs, and communicating effectively with diverse audiences.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: no

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

n/a

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  The expertise required for SJC fellowship are needed on a time limited basis with temporary grant funding.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this project is short-term and grant-funded.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. Yes. Provide training, coaching and technical assistance to the District Attorney's Office staff and other City department staffProvide training, coaching and technical assistance to the District Attorney's Office staff, Adult Probation Department staff, and other City department staff. Number of hours will vary based on SJC partner need. Training plan to be developed with contractor and SJC Fellows.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
  No.

7. <u>Union Notification</u>: On <u>08/07/2020</u>, the Department notified the following employee organizations of this PSC/RFP request: <u>all unions were notified</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Lorna Garrido Phone: (628) 652-4035 Email: lorna.garrido@sfgov.org

Address: 350 Rhode Island Street, North Building, Suite 400N San Francisco, CA

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42732 - 20/21

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>lorna.garrido@sfgov.org</u>

To: Garrido, Lorna (DAT); Criss@SFMEA.com; Meyers, Julie (HSA); seichenberger@local39.org;

camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com;

WendyWong26@yahoo,com; wendywong26@yahoo,com; sarah,wilson@seiu1021,org;

kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org;

tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Katherine

(PUC); Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; MRainsford@local39.org;

Wendy, Frigillana@seiu1021,org; pscreview@seiu1021,org; pkim@ifpte21,org; agonzalez@iam1414,org; ted,zarzecki@seiu1021,net; leah,berlanga@seiu1021,org; gail@sffdlocal798,org; cityworker@sfcwu,org; davidmkersten@gmail,com; djohnson@opcmialocal300,org; ramonliuna261@gmail,comnet; ablood@cirseiu,org; pkarinen@nccrc,org; tony@dc16,us; stevek@bac3-ca.org; xiumin,li@seiu1021,org; Poon, Sin Yee (HSA); smcgarry@nccrc,org; rmitchell@twusf,org; grojo@local39,org; jduritz@uapd,com; staff@SFMEA,com; mike@dc16,us; khughes@ibew6,org; L21PSCReview@ifpte21,org; sfsmsa@gmail,com; mshelley@dc16,us; david,canham@seiu1021,org; jtanner940@aol,com; oashworth@ibew6.org; L21PSCReview@ifpte21,org; LiUNA,local261@gmail,com; local200twu@sbcqlobal,net; speedy4864@aol,com; Christina@SFMEA,com; ecdemvoter@aol,com; thomas,vitale@seiu1021,org; Garrido, Lorna (DAT); DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42732 - 20/21

**Date:** Friday, August 7, 2020 2:05:18 PM

RECEIPT for Union Notification for PSC 42732 - 20/21 more than \$100k

The DISTRICT ATTORNEY -- DAT has submitted a request for a Personal Services Contract (PSC) 42732 - 20/21 for \$350,000 for Initial Request services for the

period 09/01/2020 - 04/30/2023. Notification of 30 days (60 days for SEIU) is

required.

After logging into the system please select link below, view the information and

verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15372 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again, change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# Additional Attachment(s)



# City and County of San Francisco Adult Probation Department



### **REQUEST FOR QUALIFICATIONS (RFQ)**

Public Safety & Community Corrections Organizational Services RFQ#APD2019-03

CONTACT: Elisa Baeza, elisa.baeza@sfgov.org

#### **Background**

The San Francisco Adult Probation Department ("APD") supervises adults on probation, post-release community supervision, and mandatory supervision, provides reports to the Superior Court to inform sentencing decisions, and connects clients with specialized services designed to increase well-being and reduce recidivism. APD is committed to "Protecting the Community, Serving Justice, and Changing Lives". This mission is achieved through the implementation and use of evidence-based supervision practices, including collaboration with the Courts, District Attorney, Public Defender, Community-Based Organizations, Reentry Council, Sheriff, Police, and other City Departments. The goal of APD is to increase public safety though effective engagement with clients on supervision, provide services that support client needs, reduce victimization, improve client well-being and reduce recidivism.

APD invites responses from qualified firms or individuals to assist with APD's operations in an array of Public Safety and Community Corrections organizational services within the following Service Areas:

- 1) Grant Writing
- 2) Organizational Development
- 3) Communications
- 4) Research and Evaluation
- 5) Professional Development, Coaching, and Training
- 6) Internal Administrative Investigation Services
- 7) Project Management: Continuous Quality Improvement or Technology

Proposers may submit qualifications for one or more Service Areas

Other City Departments and other public safety agencies may utilize the results of this competitive Solicitation (see Administrative Code section 21.16(c).) in accordance with their laws, rules, and regulations

Each Proposer must demonstrate that it meets the Minimum Qualifications described in *RFQ Attachment V* to be evaluated for this solicitation.

#### RFQ Schedule\*\*

RFQ Issued	10/15/2019
RFQ Questions Deadline (12:00 pm PT)	10/21/2019
RFQ Answers and Clarification Available	10/28/2019
RFQ Proposal Deadline (12:00pm PT)	11/19/2019
	<del>-11/18/2019</del>
Notice of Pre-Qualification Released	12/20/2019

\*\*Each date subject to change. Check the <u>Adult Probation Department</u> website or the SF City Partner website for the latest RFQ schedule.

Estimated Date of when a Pre-Qualification List will be established is December 20, 2019.

**Estimated Contracts Amounts:** The combined value of all resulting contract agreements procured using this solicitation is estimated to be \$2,500,000, subject to contract negotiations, availability of funds, and department needs. APD reserves the right to increase contract amounts in accordance with City rules and regulations, including the City's Civil Service Commission.

**Estimated Contracts Term:** Proposers pre-qualified under this RFQ will remain eligible for consideration for contract negotiations on an as-needed basis for two (2) years from the Pre-Qualification Notification date. Firms pre-qualified under this RFQ are not guaranteed a contract agreement. Actual contracts periods may vary, depending upon service needs and contractors performance at APD's sole and absolute discretion.

APD reserves the right to allocate funds greater than the estimated available funds based on availability of funds or the department's needs.

In no event shall a single contract have a term longer than five years. The actual contracts terms and amounts are subject to City rules and regulations, availability of funding, proposals, contracts negotiations, and department needs.

### Contract Monitoring Division Local Business Enterprise ("LBE") Subcontracting Requirement:

There is no local business enterprise ("LBE") subcontracting goal for this RFQ or the contracts awarded from this RFQ, as indicated in CMD Waiver #9768. However, LBEs are strongly encouraged to submit responses and will receive bonus points as outlined in RFQ Section 4.3.

**RFQ Questions and Communications:** Interested parties are directed NOT to contact any employees, agents, or officials of the City other than those specifically designated in this RFQ and its attachments.

**Email questions to:** <a href="mailto:elisa.baeza@sfgov.org">elisa.baeza@sfgov.org</a> by the RFQ Questions Deadline.

No questions will be accepted after the RFQ Questions Deadline with the exception of City Supplier compliance questions.

Adult Probation Department • 880 Bryant Street, Room 200 • San Francisco, CA 94103 • http://www.sfgov.org/adultprobation

### 1. Introduction

#### 1.1 Definitions

General terms used in this Request for Qualifications (RFQ) are defined as follows:

City: refers to the City and County of San Francisco.

**Consultant:** refers to any Proposer individual or team, which may consist of a Prime Consultant who will serve as the prime contractor, if selected by APD for contract award.

**Contractor:** refers to any Proposer awarded a contract for services under this Request for Qualifications.

**Proposer**: refers to any entity submitting a Response to this Request for Qualifications.

**Response:** refers to the qualifications package submitted for this Request for Qualifications.

**Service Area:** refers to the category of services for which the Proposer is interested in prequalification consideration.

**APD:** refers to the San Francisco Adult Probation Department. Also referred to as "APD" and "SFAPD".

#### 1.2 Intent of this Request for Qualifications

The City and County of San Francisco ("City") Adult Probation Department ("APD") seeks Responses from Proposers interested in a potential contract for the following Public Safety and Community Corrections Service Areas including:

- 1. Grant Writing
- 2. Organizational Development
- 3. Communications
- 4. Research and Evaluation
- 5. Professional Development, Coaching, and Training
- 6. Internal Administrative Investigation Services
- 7. Project Management: Continuous Quality Improvement or Technology

It is the intent of APD to create a pre-qualified pool of Consultants from which APD may choose prospective Contractors on an as-needed basis for two (2) years from the Pre-Qualification Notification date. APD will negotiate the specific scope of services, budget, deliverables, and timeline for each project it decides to pursue.

This Request for Qualifications is no guarantee of a minimum amount of work or compensation for any of the Proposers selected for pre-qualification. APD may select Contractors from the pre-qualified pool in its sole and absolute discretion.

Pre-qualified Proposers must demonstrate specialized knowledge, expertise, and state-of- theart techniques that are beyond the capabilities of the City's staff and resources. APD will create a pre-qualified pool of Consultants possessing a wide range of backgrounds and experiences.

To make its pre-qualification determination, APD will evaluate Proposer qualifications, including prior project description information, firm and staff qualifications, and other information, as described herein.

Other City Departments and other public safety agencies may utilize the results of this competitive Solicitation (see San Francisco Administrative Code section 21.16(c).) in accordance with their laws, rules, and regulations.

#### 1.3 Background of APD

The San Francisco Adult Probation Department (APD) is an integral partner in the City's criminal justice system. APD contributes to public safety by supervising clients placed on probation, post release community supervision, and mandatory supervision, providing reports to the Superior Court to inform sentencing decisions, connecting clients to specialized services designed to increase well-being and reduce recidivism, and supporting victims of crimes by providing information about their rights. APD's goal is to increase public safety though effective engagement with clients on supervision, provide services that support client needs, reduce victimization, improve client well-being and reduce recidivism.

APD supervises adult clients on probation, post release community supervision, mandatory supervision, and diversion. Supervision of each client is tailored based on individual risk and needs, as assessed using a validated risk and needs assessment (RNA) tool. The RNA tool assesses both the client's risk of reoffending and their criminogenic needs. Using evidence-based practices, APD collaborates with the court, law enforcement, criminal justice partners, the Department of Public Health, victim organizations, and numerous community-based organizations to match clients with appropriate services, including treatment programs, housing, and other support services that are designed to address needs and empower client success.

APD strives to create an environment in which staff and clients alike have access to culturally and linguistically appropriate services and opportunities. Through its policies, practices, and operations APD demonstrates respect, awareness, and appreciation of clients' and staff's beliefs, practices, traditions, religions, history, languages, and justice-involvement histories.

#### 1.3.1 Staff Composition

APD workforce is renowned for its professionalism and commitment to providing high quality and cost-effective services to all people under its supervision. The Department has 152 employees distributed as follows:

#### A. Sworn staff

- 1. *Training and Special Programs Division:* Provides and coordinates training to sworn and non-sworn APD personnel.
- 2. *Specialized Services Division*: provides evidence-based supervision to clients who present higher risk of reoffending and more complex needs.
- 3. *Community Supervision Services Division*: applies evidence-based supervision practices to the case management of clients.
- 4. *Investigations and Court Services Division*: prepares investigative reports to aid judges in reaching court dispositions for clients.

#### B. Non-sworn staff

- 1. Victim Restitution: Conducts outreach to victims of crime in order to notify victims of their right to restitution under the California Constitution, assist victims in compiling restitution requests, coordinate with justice system partners, and assist victims in securing a restitution order from the Court.
- 2. Finance and Administrative Services Division: supports the Department in the areas of fiscal management, and operational and business analysis.
- 3. *Human Resources Division*: manages all personnel and payroll matters for the Department. This includes hiring, retention, and coordinating staff leaves, etc.
- 4. *Information Technology Division*: incorporates the latest technology and practices to facilitate and maximize the operational flow of the Department.
- 5. Records and Reception Division: provides the first line of contact between the Department, clients, and the public; it offers a centralized depository of information critical for the investigation and supervision of clients.
- 6. Reentry Division: directs collaborative efforts to promote policy, operational practices, and supportive services and coordinates reentry services for clients and other justice-involved involved San Francisco residents.
- 7. Research: Enhance the department's ability to protect the community, serve justice, and change lives by conducting rigorous policy and applied research, effectively communicate and collaborate with individuals within and outside the department, and provide comprehensive information designed to inform policy and practices of the criminal justice system.

#### 1.3.2 APD Mission, Vision, and Values Statements.

Mission: "Protecting the Community, Serving Justice and Changing Lives."

**Vision:** APD achieves excellence in community corrections, public safety and public service through the integration of Evidence Based Practices and a victim centered approach into our supervision strategies. We collaborate with law enforcement, Courts, the Department of Public Health, victim organizations and community based organizations to provide a unique blend of enforcement, justice and treatment. We are leaders in our profession, exemplifying the highest standards. We extend a continuum of integrated services to address our clients' criminogenic needs and empower them to become productive law-abiding citizens.

Values: "P.R.O.T.E.C.T. Our Community."

<u>Protect</u>: We value protection of the residents of the City and County of San Francisco.

<u>Respect</u>: We value respect and personal wellness for ourselves, each other and all members of the community.

<u>Opportunities</u>: We value providing opportunities for offender rehabilitation, improved public safety, victim restoration, and maximizing officer and employee potential.

<u>Teamwork</u>: We value teamwork and cooperation through partnerships with all justice and community stakeholders.

Ethics: We value impartiality, accountability, diversity, professionalism and a strong work ethic

Commitment: We value our commitment to Public Safety and Public Service.

<u>Trust</u>: We value the trust placed in us by the public we serve and perform out duties with integrity and possess the skills set unique to our profession through systematic integration of Evidence Based Principles.

This RFQ seeks Respondents that have a service delivery philosophy that supports the department's Mission, Vision and Values, as well as the APD <u>Strategic Plan</u>, and the following governing initiatives.

#### 1.3.3 Governing Initiatives

#### 1.3.3.1 California Community Corrections Performance Incentive Act (2009):

Local criminal justice reform met statewide reform mandates at an unprecedented crossroads in the last decade. SB 678 was signed into law in October 2009. The purpose of the bill is to reduce recidivism amongst felony supervision clients by improving probation services using evidence-based practices. SB 678 required the formation of a Community Corrections Partnership ("CCP"), which advises the county on the use of evidence-based practices in sentencing and probation supervision and makes funding recommendations as related to this act and the Public Safety Realignment Act, outlined below. SB 678 also created the Community Corrections Performance Incentive Fund, which rewards county probation departments for decreasing the number of felony clients that are revoked and sentenced to state prison. From 2009 through 2018, APD successfully decreased its commitments of felony clients to state prison by over 75 percent. For this remarkable success, APD has incentive funding from the state to further support the implementation of evidence-based practices. APD has dedicated 100 percent of these resources to services, housing, treatment, employment, and related services to support people on supervision through the implementation of evidence-based alternatives to state prison.

#### 1.3.3.2 Public Safety Realignment Act (2011):

In an effort to address overcrowding in California's prisons and assist in alleviating the state's financial crisis, the Public Safety Realignment Act ("AB 109") was signed into law on April 4, 2011. Amended by AB 117 (2011), SB 2021 (2012), and SB 1023 (2012), AB 109 transfers responsibility for supervising specified lower level inmates and parolees from the California Department of Corrections and Rehabilitation to counties. Implementation of the Public Safety Realignment Act began on October 1, 2011.

A summary of the four major changes enacted by Public Safety Realignment appears below.

- a. Post-Release Community Supervision (PRCS): People released from State Prison on or after 10/11/2011 who were serving a sentence for a non-serious, non-violent, or non-sex offense are released to PRCS, which is administered in by county probation departments. Prior to 10/1/2011, individuals released from state prison for these offenses would have been placed on State Parole.
- b. *Mandatory Supervision (Redefining Felonies per* California Penal Code § 1170(h)): Individuals convicted of certain felonies on or after 10/1/2011 may be sentenced to county jail or may be sentenced to serve time that is split between county jail and a period of community supervision called Mandatory Supervision. Mandatory Supervision is administered by county probation departments.
- c. *Parole Violations*: People released from State Prison on or after 10/1/2011 who served a sentence for a serious, violent, or sex offense are released to State Parole. As of 7/1/2013, parole revocation hearings are heard in by superior courts and, if warranted, parole

violation sentences, which were previously served in State Prison, are now served in county jails.

# 1.3.3.3 Reentry Council of the City and County of San Francisco ("Reentry Council")

Established in 2008 by San Francisco Administrative Code 5.1, the Reentry Council initiates a broad-based effort to identify the range of reentry services that may best support a client's successful and permanent transition from the criminal justice system to the community. Efforts are largely driven by the Reentry Council's two subcommittees, Direct Services and Legislation, Policy and Practices. These subcommittees include knowledgeable and committed city representatives, members of the community, formerly incarcerated individuals and other front line professionals that work tirelessly to help currently and formerly incarcerated people permanently exit the criminal justice system. The Reentry Council's due diligence also includes review of the existing reentry services stock and service capacity, focus groups with city and community partners, and focus groups with a wide range of consumers of reentry services.

In 2011, the Reentry Council of the City and County of San Francisco collaborated with the Bureau of Justice Assistance (BJA) and the Justice Reinvestment Initiative (JRI) to learn more about the impact of reentry services on the justice-involved population in San Francisco. Through data analysis, Justice Reinvestment sought to safely reduce corrections and related criminal justice spending and reinvest savings in efforts that effectively mitigate crime and support successful reintegration of previously incarcerated people into their communities.

In 2014, through JRI, the Reentry Council sought to delve deeper into racial and ethnic disparities within San Francisco's criminal justice system and advanced two efforts: 1) Community stakeholder conversations, and 2) collaboration with the W. Haywood Burns Institute for Justice, Fairness and Equity ("Burns Institute"). The Burns Institute gathered and analyzed available data from criminal justice partners, and facilitated several stakeholder conversations, which culminated in a report and presentation to the Reentry Council. The results of the Burn's Institute report underscored expansive criminal justice data issues, data systems silos, overrepresentation of African Americans at every point on the criminal justice system from arrest through sentencing. While San Francisco's African American population is less than six percent, the report concluded that African Americans represent 40 percent of people arrested, 44 percent of people booked into county jail, and 40 percent of people convicted in San Francisco.

In 2018, the Reentry Council took another proactive step and adopted the Criminal Justice Racial Equity Statement, as outlined below:

"The San Francisco Community Corrections Partnership, Juvenile Justice Coordinating Council, Reentry Council and Sentencing Commission prioritize racial equity so that all people may thrive. San Francisco's criminal justice policy bodies collectively acknowledge that communities of color have borne the burdens of inequitable social, environmental, economic and criminal justice policies, practices and investments. The legacy of these government actions has caused deep racial disparities throughout San Francisco's juvenile justice and criminal justice system. We further recognize that racial equity is realized when race can no longer be used to predict life outcomes. We commit to the elimination of racial disparities in the criminal justice system."

The Reentry Council hopes this Criminal Justice Racial Equity statement will be used in all Request for Proposals or Request for Qualifications and that contractors will create objectives that will help the Reentry Council of the City and County of San Francisco in the dismantling of racial disparities and inequities.

### 1.3.3.4 Reentry Council Focal Areas

- a. Civil Rights and Civic Engagement: Ensures that individuals with conviction histories are able to have their basic needs met so that individuals can fully function and thrive in their neighborhoods and the greater San Francisco community. The Council primary focus for this year has been around democracy and the power of voting and advocacy. The council believes as individuals learn to fully engage in community and government, they gain independence, self-empowerment and a healthy separation from the criminal justice system.
- b. Health and Well Being: Ensures that individuals with conviction histories can have access to appropriate housing, physical health, behavioral health and other peer driven wellness strategies. One of the Direct Services Subcommittee's focus has been on the expansion of reentry services geared toward members of the gender non-confirming community. In addition, the Direct Services committee been interested in the creation of afterhours connections to mental health and substance abuse treatment.
- c. Self Sufficiency: Ensures that individuals with conviction histories receive a breadth of education, employment, income support and financial empowerment services both in custody and in the community so that they can take full responsibility for financial obligations. Individuals are less likely to re-engage in criminal activity when they create and have the resources to sustain themselves. The Council has supported the launch of a web-based Getting Out and Staying Out Guide for individuals exiting custodial care.
- d. Welfare and Safety of Families, Victims and Communities: Ensures a clear focus on the traumatic impact that criminal justice involvement has on families, victims and communities and seeks to ensure meaningful opportunities for families to stay connected during incarceration or to re-connect post incarceration. One of Legislation, Policy, and Practices Subcommittee focus has been on maintaining child/ guardian relationship and supporting incustody family visitation.
- e. Community Justice and Alternatives to Incarceration: Ensures that decision makers in the criminal justice system look beyond offense based disposition, isolation and containment options and towards integrating analysis of criminogenic needs into sentencing, custody and community corrections decisions. In 2018, the Direct Services Subcommittee form a working group around alternatives to incarceration.

# 2. Scope of Work

### 2.1 General Information

The scope of work described below is intended as a general guide to the work APD expects to be performed, and is not a complete listing of all services that may be required or desired. To minimize duplication of effort and to allow the City to coordinate data requests and data available for previous and future survey projects, the selected Proposer's findings and data gathered may be shared by the City with other City contractors, as deemed appropriate by the City.

Each Proposer should demonstrate its capabilities by using *RFQ Attachment V: MQs & Prior Project Descriptions*. Responses that do not meet or exceed the Minimum Qualifications will not be evaluated or eligible for pre-qualification and/or contract award.

APD will negotiate the specific scope of services, budget, deliverables, and timeline with prequalified Proposers selected for contract negotiations. There is no guarantee of a contract award, minimum amount of work or compensation for any Proposer(s) selected for contract negotiations.

### 2.2 Description of Services

#### A. Overview

Each Proposer will be expected to demonstrate how its service delivery approach:

- A. Will support APD's Mission, Vision and Values, the current <u>Strategic Plan</u>, as well as the governing initiatives discussed in Sections 1.3 above.
- B. APD seeks services that will simultaneously use evidence-based practices to help APD achieve outcomes, and corroborate those outcomes through measurement and exhaustive communication. Data are used to drive decisions and develop innovative approaches to delivering services. For criminal justice organizations, this strengthens public safety by reducing recidivism. Ensuring that staff either have or acquire the skills necessary to implement Evidence Based Practices is important.
- C. Will assist APD with evaluating its progress in executing the Key Strategies discussed in the APD <u>Strategic Plan</u>.
- D. Will assist APD in becoming a national leader in delivering supervision and reentry services that increase victim safety and enhance the lives of individuals under APD's supervision, their families, and their communities.

All Contractors will be expected to:

- Establish and maintain an effective working relationship with APD liaisons.
- As applicable, maintain confidentiality in accordance with Criminal Offender Record Information ("CORI"), as governed by California Penal Code § 13300, and/or enter into Data Use Agreements with the City describing all required measures to ensure the confidentiality of APD records and other information as may be subject to privilege, insofar as is required and permitted by applicable law and accepted standards of ethical practice.

- Attend required project status meetings with APD staff, as requested by APD.
- Provide written status reports to APD, as requested by APD.

### 2.3 Service Areas

Due to the nature of as-needed services, APD will not define specific scopes of work for contracts in advance. The following scope serves only as a guide for submission of Responses. To be considered for pre-qualification in the following service areas, Proposers must meet the Minimum Qualifications (see *RFQ Attachment V: Minimum Qualifications and Prior Project Descriptions*).

### SERVICE AREA 1: Public Safety and Community Corrections Grant Writing

APD seeks to enhance capacity through external funding sources, including private, state, and federal grant opportunities. APD seeks experienced grant writers who can present information persuasively and professionally and in response to the requirements of applicable solicitations. Proposers must demonstrate a track record of obtaining grants through established prospect research methods. Selected Contractors will work with staff to develop highly competitive grant applications to fund a range of projects and initiatives.

### **Service Area 1 Goals:**

- A. Assist APD with grant writing projects, as needed, consistent with the department's goals.
- B. Expand APD's programmatic capacity and innovation through successful grant applications.

### Service Area 1 Tasks may include, but not be limited to:

- Develop, draft and implement grant writing program strategic plan.
- Develop and draft grant Proposals, including responses to complex federal and state solicitations.
- Develop budgets.
- Develop goals and measurable objectives.
- Participate in grant planning meetings with internal staff and relevant city and community-based partners.
- Develop and draft Memoranda of Understanding.
- Draft and secure letters of support.
- Develop timelines for grant completion and meet internal and external deadlines.
- Maintain a working knowledge of San Francisco's criminal justice systems, and the public systems that intersect with them.
- Maintain familiarity with San Francisco City/County departments and community-based providers engaged in servicing these systems and the individuals involved in them (including offenders, victims, and their families).
- Maintain familiarity with best practices in criminal justice and community corrections.
- Maintain familiarity with relevant public and private funders.

# SERVICE AREA 2: Public Safety and Community Corrections Organizational Development

APD has undergone extraordinary growth and change over the past few years. In the same way, the criminal justice system in the City and County of San Francisco, and State of California, have experienced significant reforms and more are forthcoming. APD seeks qualifications from providers of organizational development and implementation services with experience in probation and criminal justice organization settings. Selected Contractors should be prepared to work with a dynamic and rapidly changing department that has already invested substantial staff resources, into the development of an updated <a href="Strategic Plan">Strategic Plan</a>, and successful partnerships with other criminal justice agencies and partners in the City and County.

#### Service Area 2 Goals:

- A. Create and facilitate the implementation of an organizational development action plan. This may include change management, policy reform implementation, and quality assurance.
- B. Assess staff development efforts and staff engagement levels to maximize APD's ability to execute organizational initiatives and to continuously improve and sustain itself as an Evidence Based Organization. This may include a staff training needs assessment, supervisorial coaching, performance measurement, climate surveys and facilitation of staff committees.
- C. Work with APD to determine, plan, implement, and measure progress on specific initiatives, including APD's survivor and victim services, the Community Corrections Partnership Realignment Implementation Plan, and others.
- D. Work with APD's criminal justice and social service partners to develop a comprehensive Criminal Justice Master Plan for the City and County of San Francisco, which includes capital projects, policy options, service enhancements, and identified funding sources/needs.

### Service Area 2 Tasks may include, but not be limited to:

- Identify, analyze, recommend, facilitate, and/or implement successful approaches and strategies to foster staff engagement and accountability, promote efficiencies, reduce risks, and identify needs in management and operational practices.
- Identify, analyze, recommend, facilitate, and/or implement successful approaches and strategies related to community corrections.
- Identify, analyze, recommend, facilitate, and/or implement successful approaches and strategies to develop, track, and measure performance and outcomes related to personnel, management, operational, and community corrections practices.
- Facilitate and coordinate APD management and staff committees, meetings, and discussions.
- Negotiate and meet with City departments to obtain relevant data.
- Develop sample interagency work agreements.
- Conduct qualitative evaluations of processes, outcomes, and impacts.
- Provide technical and facilitation assistance in the development of organizational and operational action plans.
- Prepare timelines for recommended strategies.
- · Conduct cost analyses.
- Develop logic models.
- Facilitate organizational development meetings with relevant City and community representatives.
- Present finished products to APD management or at public meetings of policy bodies such as the Community Corrections Partnership or Reentry Council.

### SERVICE AREA 3: Public Safety and Community Corrections Communications

APD seeks qualifications from experienced "one-stop shop" providers of communications services, including public relations and outreach, branding, social media, graphic design, and printing services to work directly with APD executives and subject matter experts across the department on the following goals and tasks.

### **Service Area 3 Goals:**

- A. Assist APD with developing a communications plan consistent with key strategies of APD's Strategic Plan.
- B. Provide a clear, professional, innovative and consistent look, feel, and messaging through all of its publications and digital or social media presence to various stakeholders, partners, funders, and constituents. This may include assistance to lead APD staff in developing and implementing a monthly newsletter and website content refresh plans.
- C. Assist APD with developing, managing, and implementing proactive and responsive media and public relations; directing external messaging including press inquiries, press releases, statements and publications.
- D. Assist APD with maintaining awareness of official APD positions on issues of importance to provide responses to inquiries from policy makers and the public.

### Service Area 3 Tasks may include, but not be limited to:

- Provide a clear, professional, innovative and consistent look, feel, and messaging through all of its publications and digital or social media presence to various stakeholders, partners, funders, and constituents. This may include assistance to lead APD staff in developing and implementing a monthly newsletter and website content refresh plans.
- Design print media and APD reports and materials, including materials to be distributed to San Francisco Superior Court, clients under supervision of APD, stakeholders, law enforcement partners, funders, or other key constituents.
- Consult with APD to develop branding for reports, presentations, public information, and other public outreach tools.
- Advise APD and constituents on developing public relations tools, outreach and education, or campaigns about sensitive criminal justice policy issues.
- Print materials for APD, including reports, brochures, and other outreach materials.
- · Develop content for APD website.
- Consultation on the development and implementation of social media communications strategies, as requested.
- Assist APD with developing strategic communication and education on key projects.
- Provides media training to prepare staff as appropriate.

#### SERVICE AREA 4: Public Safety and Community Corrections Research and Evaluation

As an evidence-based practice organization, APD seeks to build upon its capacity to enhance the department's ability to protect the community, serve justice, and change lives by conducting rigorous policy and applied research designed to provide comprehensive information that can be used to inform policy and practices of the department and the criminal justice system. APD seeks qualifications from professionals with knowledge of and experience with administrative data, and sequel developer, and/or experience conducting policy and applied research and evaluation in community corrections, public safety, public health, supportive housing, workforce development, and related areas to work collaboratively and proactively on special projects with APD staff and other justice partners.

#### Service Area 4 Goals:

Below is a list potential research and evaluation projects APD is interested in completing:

- A. Decision Point Analysis examine and address racial and ethnic disparities in community supervision through a careful and detailed analysis of critical decision points in adult supervision recommendations and practices: pre-sentence investigation (PSI) recommendations regarding sentencing and supervision; motions to revoke (MTRs) petitions filed for alleged noncompliant behavior associated with technical violations and new law violations; "flash" incarcerations short periods of detention in county jail for specific supervisees, and recommendations for early termination of supervision.
- B. Extraction Procedures establish administrative database extraction procedures and scripts designed to create a comprehensive, efficient, and cohesive approach to data infrastructure and policy and applied research needs. This approach is designed to structure, reshape, codify, create, and transform administrative data into data that can be used for policy and applied research purposes.
- C. Creation of Internal and External Data Dashboards identify internal and external information needs, develop plans for identifying existing and new variables and displays, develop procedures for cleaning and migrating existing data from Tableau to Power BI and importing new data to dashboards, develop automated procedures for regular updates and distribution of the data dashboards, and create process documentation describing methods and procedures.
- D. Comprehensive Recidivism Project develop data migration scripts to import 10-year Department of Justice criminal history data into data dashboards, and analyze criminal history trends based on events, e.g., record of arrest and prosecution (RAP) sheet arrests, convictions, subsequent dispositions, periods of confinement, and/or no arrest received (NAR) events.
- E. Ontario Domestic Assault Risk Assessment (ODARA) Pilot conduct an inter-rater reliability study to analyze overall ODARA scores, compare these to gold standard ratings, and analyze the overall rate of agreement among those who completed the tool; conduct a validation study to analyze the predictive accuracy of the ODARA cut point levels and scores in relation to future domestic violence incidents.
- F. Responses to prosocial and noncompliant behavior conduct an analysis of 12-month case file and court hearing information regarding instances of and responses to prosocial and noncompliant behavior of people on supervision; summarize findings on prosocial behavior and rewards; and summarize findings on noncompliant behavior (i.e., new law violations and technical violations) and responses to these types of noncompliant behavior.
- G. Systems and Database Codebooks create code books/data dictionaries for the department's case management system, the risk and needs assessment system, and the community assessment and services center (CASC) database(s).
- H. Performance and Workload Measures establish new automated procedures and scripts designed to address the department's strategic goals and facilitate the reporting of existing performance measures; develop new performance and workload measures that align with the department's strategic plan and that quantify the department's workload associated with legislative, criminal justice, and reentry functions.

I. Reentry Evaluation of Services – conduct a process and outcome evaluation of services and programs provided by the department and its contractors, including the creation of an inventory of services, documentation of which services are evidence-based and promising practices, and a benefit/cost analysis based on evidence-based and promising practices. As part of this project, the following factors will need to be considered: assessed client needs related to recidivism and client well-being; referrals to services, intake appointments, enrollments, participation, exits, length of service/program participation, and other factors needed to assess client outcomes and well-being and program impact.

### Service Area 4 Tasks may include, but not be limited to:

- Perform comparative program policy/practice research and literature reviews.
- Develop research proposals that include research questions, methodology, process and outcome measures, data collection methods and elements, proposed analysis plans and statistics, and deliverables.
- Work collaboratively and proactively with APD staff, and other justice partners, on all research and evaluation projects and tasks and devote time to understanding the limitations of administrative data
- Develop databases to store and analyze data.
- Compile, clean, and maintain data from different data sources.
- Produce extraction procedures, automated scripts, and documentation procedures on all data-related functions including extraction, migration, restructuring, transformation, cleaning, etc.
- Perform statistical analysis of quantitative data.
- Conduct content analysis of qualitative data such as interviews and focus groups.
- Design surveys, interview protocols, focus group protocols, observation forms, and other data collection instruments.
- Collect quantitative and qualitative data effectively (e.g., in a culturally and contextually appropriate manner).
- Prepare summary reports of evaluation findings that clearly communicate results in a
  way that facilitates action and program improvement, share all preliminary findings
  and reports with APD for the department's review prior to distribution.
- Develop programmatic and policy recommendations informed by evaluation findings.
- Conduct cost-benefit and/or cost-effectiveness analyses.

# SERVICE AREA 5: Public Safety and Community Corrections in Professional Development, Coaching, and Training

APD is committed to assisting its workforce including deputy probation officers, supervisors, and directors, as well as non-sworn staff, in acquiring and maintaining the necessary knowledge and skills to adhere to evidence-based practices standards and clinical services within community corrections. The Department seeks providers in the areas of professional development, coaching, and training with experience working with criminal justice, public safety and community corrections agencies, and workforces to support APD in developing in this service area.

#### **Service Area 5 Goals:**

- A. Implement a coaching plan for deputy probation officers, supervisors, and directors to develop appropriate probation case management and offender supervision strategies.
- B. Increase leadership and coordination among APD staff, units, and divisions through training, coaching, and other professional development strategies.

C. Increase APD's capacity and credentials through training, coaching, and other professional development strategies to provide effective supervision practices to its clients and the community at large.

### Service Area 5 Tasks may include, but not be limited to:

- Deliver individual and group coaching sessions, and trainings, to APD staff.
- · Develop staff progress reports based on services provided.
- Make recommendations on professional development strategies of interest to APD and its staff.

# SERVICE AREA 6: Public Safety and Community Corrections Internal Administrative Investigation Services

APD seeks assistance from individuals or entities with expertise in human resources, labor relations, or similar expertise to assist the Department in conducting internal administrative investigations of employee misconduct.

### Service Area 6 Goals:

- A. Assist APD with interpreting and analyzing policies and policy implications for ]the Department during the course of any internal administrative investigations of employee misconduct.
- B. Assist APD with developing recommendations for next steps in internal administrative investigations of employee misconduct.

### Service Area 6 Tasks may include, but not be limited to:

- Performing policy research and analysis of applicable policies, court procedures, and other relevant matters, as they relate to internal administrative investigations of employee misconduct.
- Acting as a dedicated resource for APD on legal and policy matters, as appropriate.
- Be able to discuss complex policy in an accessible manner with diverse stakeholders with different professional experiences.

# SERVICE AREA 7: Public Safety and Community Corrections Project Management for 1) Continuous Quality Improvement\* or 2) Technology\*\*

APD seeks project management consulting services to assist the Department with planning, implementing, and monitoring progress of projects related to 1) Continuous Quality Improvement, and 2) Technology in the public safety and community corrections sector. Project Management consultants should have experience applying project management successfully in a variety of public safety and community corrections settings. Project Management consultants must meet the specific requirements outlined below for either the 1) Continuous Quality Improvement project or the 2) Technology project. The Project Management consultant may submit proposals for one or both focus areas of Service Area 7 if they meet all specific requirements.

#### **Service Area 7 Goals:**

A. Assist APD with its project management needs to support special one-time projects and ongoing projects. Consultant should have experience applying project management successfully within public safety and community corrections settings.

### Service Area 7 Tasks may include, but not be limited to:

- Manage projects and related specific activities within given constraints of time, budget and quality.
- Conduct periodic and post-project reviews to ensure project is on track.
- Ensure all project documentation is updated and conveyed to relevant stakeholders on time.
- Plan, schedule and control activities to fulfill identified objectives applying technical, theoretical and managerial skills to satisfy project requirements.
- Enforce and develop integrated development plan representing appropriate level of detail.
- Ensure alignment on project goals and deliverables.

Please review below the outlined specific requirements for the Continuous Quality Improvement project, and the specific requirements for the Technology project.

# \*CONTINUOUS QUALITY IMPROVEMENT Requirements for Service Area 7:

APD seeks project management consultancy services to successfully develop and implement a continuous quality improvement (CQI) program to advance the implementation of evidence-based practices (EBPs) and improve client outcomes. Sample project objectives and goals for the CQI program are listed below. Consultants should be able to provide services that meet these objectives and goals, and must have:

- 1) Extensive knowledge of evidence-based practices in community corrections and public safety.
- 2) Extensive knowledge of CQI processes and strategies
  - a. Recent 5 years hands-on experience developing and implementing CQI practices in community corrections and public safety, or related settings (e.g., in a substance abuse, mental health, at risk youth, or similar behavioral change setting).
- 3) Extensive knowledge of project management
  - Recent 5 years hands-on demonstrable experience with developing, implementing, and/or evaluating projects in public agencies and/or a behavioral change setting.
  - b. Recent 5 years hands-on experience planning, coordinating, and facilitating meetings from a diverse group of employees and stakeholders (e.g., line staff management, agency clients, etc.) to develop project-related strategy and gather input.
- 4) Extensive knowledge of program evaluation
  - a. Recent 5 years hands-on experience in program evaluation in community corrections and public safety, or related settings, and familiarity with different types of outcome measures in community corrections (e.g., reduced recidivism, reduced revocations, increased time to re-arrest, improved health, improved housing access, family reunification, etc.)
- 5) Relevant knowledge of and experience with addressing racial disparities in the criminal justice system.

# Sample objectives and goals related to the Continuous Quality Improvement project:

- A. Objective 1 Reduce Revocations While Protecting Public Safety:
  - i. *Goal:* To develop a comprehensive continuous quality improvement (CQI) program that: ensures the effective implementation of evidence-based

practices (EBPs) in order to reduce the clients' violations and revocations; utilizes the findings of a decision point analysis (to be conducted as a separate initiative) in order to target the sources of revocations.

- B. Objective 2 Accelerate Adoption of Evidence-Based Practices:
  - i. Goal: To develop a comprehensive CQI program that: ensures the effective implementation of a range of EBPs; enhances probation officers' EBP skills and proficiency; ensures that programs and services are available that meet client risks and needs and also apply research-based interventions; identifies the need for policy change in order to support effective EBP implementation.
- C. Objective 3 Promote Fairness and Justice
  - i. Goal: To develop a comprehensive CQI program that reduces racial and economic disparities through improved outcomes for all clients; increased consistency and reduced bias in probation officer decision-making; identification of potential sources of disparities (including potential bias in decision-making or disparate outcomes caused by resource distribution).

### \*\*TECHNOLOGY Requirements for Service Area 7:

APD seeks project management consultancy services to successfully deploy a Probation and Community Corrections Case Management System (PCC CMS) that encompasses the following:

- 1) Extensive Project Management, including but not limited to:
  - a. Recent 10 years hands-on experience in successful implementation of case management systems for public safety and community corrections agencies as the Project Manager.
  - b. Demonstrate experience applying one or more of the following: PMI PM BOK, TICK IT, TQM, Malcolm Baldrige, or equivalent PM or QA standards
- 2) Extensive knowledge of Microsoft Dynamic CRM, including but not limited to:
  - a. Recent 5 years hands-on experience in developing applications using Microsoft Dynamic CRM.
  - b. Recent 5 years hands-on experience in configuring and managing Microsoft Dynamic CRM applications for medium to large environment.
- 3) Extensive knowledge of North52 software.
  - a. Recent 4 to 5 years hands-on experience in developing integrations and business rules for medium to large environment using North52.
- 4) Extensive knowledge of Scribe software.
  - a. Recent 4 to 5 years hands-on experience in data migration and developing integrations for medium to large environment using Scribe software
- 5) Extensive knowledge of Cornerstone Learning software.
  - a. Recent 4 to 5 years hands-on experience in configuring and managing Cornerstone Learning software for medium to large environment.
- 6) Extensive experience in application development, including but not limited to:
  - a. Recent 6 years of verifiable experience in application development, with at least 4 at the senior level.
  - b. Demonstrate experience writing technical design and system documentation
  - c. Demonstrate a comprehensive knowledge and experience of Data Modeling, and Power BI reports development.
  - d. Demonstrate a comprehensive knowledge and at least 4 years of experience in JavaScript, Powershell, PHP, HTML5 and MySQL and the SharePoint.
  - e. Recent 4 years of hands-on integration development experience including API

integrations, using Bootstrap, Git, Jenkins, and other state of the art systems technologies.

### 2.4 Additional As-Needed Services

Subject to APD's approval, any agreement(s) awarded to a pre-qualified supplier under this RFQ may be amended in accordance with City requirements to include APD-requested asneeded assistance from the Contractor that is related to the services described in this RFQ. The scope and cost of as-needed services will be determined and negotiated by APD.

## 3. Pre-Submission Information

#### 3.1. Questions Deadline

Questions or requests for interpretation will only be accepted by e-mail to <a href="mailto:elisa.baeza@sfgov.org">elisa.baeza@sfgov.org</a> until the RFQ Questions Deadline indicated on the cover page of this RFQ.

Agency questions about compliance with the City's supplier requirements may still be asked and answered by the contacts designated in this RFQ. There is no deadline to submit questions related to compliance with the City's supplier requirements.

There is no deadline to submit questions related to compliance with the City's supplier requirements

### 3.2. Answers and Clarifications

A summary of the clarifications, questions and answers pertaining to this RFQ will be posted o the San Francisco City Partner website by the date indicated on the cover page of this RFQ: https://sfcitypartner.sfgov.org/pages/index.aspx.

# 4. Submission Requirements

### 4.1. Time and Place for Submission of Proposal

<u>Proposals and all related materials must be received by Response Deadline indicated in the cover page of this RFQ: Monday, November 18, 2019 at 12:00pm (PT).</u>

### Proposals must be mailed to:

Elisa Baeza Adult Probation Department 880 Bryant Street, Rm. 200 San Francisco, CA 94103

Postmarks will not be considered in judging the timeliness of submissions. Proposals submitted by e-mail or fax will not be accepted. Late submissions will not be considered, including those submitted late due to mail or delivery service failure. Note that Proposers hand-delivering Proposals may be required to open and make

packages accessible for examination by security staff. APD physical address to handdeliver Proposals is:

Adult Probation Department 850 Bryant Street, Rm. 200 San Francisco, CA 94103 c/o Elisa Baeza

### 4.2. Proposal Submission

Complete and concise responses are recommended for ease of review. Proposals should provide a straightforward, concise description of the Proposers capabilities to satisfy the requirements of the Request for Qualifications. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be <u>numbered and clearly labeled, and organized in a clear and logical fashion so that Proposal readers can easily understand information.</u> All documents must be submitted on recycled paper (30% or higher) and must be printed on double-sided pages (San Francisco Environment Code Sec. 506 (h)). As long as Proposals adhere to the page limit indicated for each RFQ Attachment, Responses can be single or double spaced. Proposers must use a simple font such as Arial or Times New Roman.

The following items must be included in your Proposal and packaged in an envelope clearly marked RFQ#APD2019-03 Public Safety & Community Corrections Organizational Services.

- A. Original Printed Proposal(s) (WITH ORIGINAL SIGNATURES) Labeled as "Original."
- B. One (1) flash drive or CD-ROM containing entire contents of Proposal, including all RFQ Attachments. The flash drive or CD-ROM, and each of the electronic files on the flash drive or CD-ROM, must be labeled with the Proposer's name and RFQ#APD2019-03. All files should be submitted in unprotected PDF (must be writeable, not just read-only) or Microsoft Word format to enable editing during agreement negotiations.
- C. Three (3) additional printed copies of Proposal(s) labeled as "Copy."

### 4.3. Proposal Content

Consultants interested in responding to this <u>RFQ MUST SUBMIT THE FOLLOWING INFORMATION</u>, IN THE ORDER SPECIFIED BELOW. This is necessary so that all Proposals can receive fair and equal evaluation. Proposals not following the required format will not be considered for evaluation. Information must be at a level of detail that enables effective evaluation and comparison between Proposals by the Evaluation Panel. Proposal must include the following components.

**RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI must be submitted for each applicable Service Area that a Proposer is applying for.** For example, if a Proposer is interested in being considered for both the *Organizational Development* service area, and the *Grant Writing* service area, then the Proposer must include RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI for the *Organizational Development* service area, and RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI for the *Grant Writing* service area - in addition to the other required attachments - for a total of two proposal submissions.

### A. RFQ Attachment I: RFQ Terms and Conditions, signed acknowledgment page

- Use RFQ Attachment I
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original."
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy."

# B. RFQ Attachment II: Local Business Enterprise (LBE) Certificate of Proof, <u>if</u> <u>applicable</u>

- Use RFQ Attachment II
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original."
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy."

# C. RFQ Attachment III: City Supplier Administrative Requirements, signed acknowledgement page

- Use RFQ Attachment III, signature page only
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original."
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy."

#### D. RFQ Attachment IV: RFQ Cover Sheet

- Use RFQ Attachment IV
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original" <u>per applicable Service Area.</u>
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy" per applicable Service Area.

### E. RFQ Attachment V: RFQ Minimum Qualifications & Prior Project Descriptions

- Use RFQ Attachment V (4-page limit, not inclusive of length of RFQ Attachment V directions)
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original" per applicable Service Area.
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy" per applicable Service Area.

# F. RFQ Attachment VI: RFQ Approach to Services, Firm & Staff Qualifications, Pricing Proposal

- Use RFQ Attachment VI (15-page limit, not inclusive of length of RFQ Attachment VI directions).
- Submit Original (WITH ORIGINAL SIGNATURES) Labeled as "Original" <u>per</u> applicable Service Area.
- Submit Three (3) additional printed copies of Proposal(s) labeled as "Copy" <u>per</u> applicable Service Area.

# 5. Proposal Evaluation and Selection

This section describes the criteria that will be used for analyzing and evaluating the Proposals. This Request for Qualifications does not in any way limit APD's right to solicit contract agreements for similar or identical services if, in APD's sole and absolute discretion, it determines the Proposals are inadequate to satisfy its needs. APD reserves the right not to award any contract agreement under this Request for Qualifications.

#### 5.1. Minimum Qualifications

Any Proposal that does not demonstrate that the Proposer meets the Minimum Qualifications by the Proposal deadline will be issued a notice of non-responsiveness and will not be evaluated or eligible for contract award under this Solicitation.

To meet the minimum qualifications and be deemed eligible for Proposal evaluation:

- A. Proposal must meet all submission requirements described in RFQ Section 4.
- **B.** Proposal must include two (2) Project Descriptions for projects that have been operational within the past five (5) years with clients similar to APD, per applicable Service Area, as described in **RFQ Attachment V**.

### 5.2. Evaluation Process

Proposals that meet the Minimum Qualifications will be evaluated on a 100-point scale by an independent evaluation panel. Proposers that meet LBE criteria will receive an additional 5-bonus points (see RFQ Section 4.3). The panel of reviewers will be responsible for evaluating and scoring responses based on agency's qualifications and demonstrated capacity to deliver services, and proposed services/program model. Thereafter, the panel of reviewers and APD staff will make a recommendation for pre-qualification, and reasonableness of proposed cost...

To be pre-qualified, Proposers must receive a total score that is at or above 70 points.

### 5.3. Proposal Evaluation Criteria (100 Points)

The proposals will be evaluated by a review panel comprised of parties with expertise in the community corrections and public safety field. APD intends for the review panel to evaluate the proposals generally in accordance with the criteria itemized below. Proposals that have been deemed to meet the Minimum Qualifications will be evaluated and scored based on the following evaluation criteria:

The maximum points any response to this RFQ can earn is 100, plus 5-bonus points if proposers meet LBE criteria (see RFQ Section 4.3). Proposals must earn a minimum of 70 points to be considered for award selection by APD. APD may in its sole discretion select any Proposer that has achieved a minimum of 70 points.

Each of the below sections will be reviewed and score based on the appropriateness of the response to the questions in each section. Below is a breakdown of the scores possible in each section.

- E. RFQ Attachment I: RFQ Terms and Conditions, signed acknowledgment page
  - Pass/Fail
- F. RFQ Attachment II: Local Business Enterprise (LBE) Certificate of Proof, <u>if applicable</u>
  - 5 Bonus Points
- G. RFQ Attachment III: City Supplier Administrative Requirements, signed acknowledgement page
  - Pass/Fail

### H. RFQ Attachment IV: RFQ Cover Sheet

• Pass/Fail - per applicable Service Area

### E. RFQ Attachment V: RFQ Minimum Qualifications & Prior Project Descriptions

Pass/Fail - per applicable Service Area

# F. RFQ Attachment VI: Approach to Services, Firm & Staff Qualifications, Pricing Proposal

• 100 Points - per applicable Service Area

**RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI must be submitted for each applicable Service Area that a Proposer is applying for.** For example, if a Proposer is interested in being considered for both the *Organizational Development* service area, and the *Grant Writing* service area, then the Proposer must include RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI for the *Organizational Development* service area, and RFQ Attachment IV, RFQ Attachment V, and RFQ Attachment VI for the *Grant Writing* service area - in addition to the other required attachments - for a total of two proposal submissions.

#### 5.4. Pre-Qualification List Determination

Proposers who score at or above 70 points of the 100 possible points for their written Responses will be qualified to participate in potential contract award negotiations with APD during a period of two (2) years from the Pre-Qualification List Notification date. There is no numerical limit to the number of agencies that may be listed on the Pre-Qualification List Notification.

Upon APD's conclusion of its Proposal evaluation process, pre-qualified Proposers will be provided with a Pre-Qualification Notification.

#### 5.5 Selection for Contract Negotiations

Pre-qualified Proposers may be asked to respond to requests for quotes, requests for proposals or other competitive processes for specific scopes of work to ensure APD receives the best value. Pre-qualified Proposers may be subject to reference checks and/or interviews prior to APD selection for contract negotiations.

If reference checks are needed by APD to confirm Proposer's experience, they will be used to verify the quality of staffing provided to prior clients, adherence to schedules/budgets, problem-solving capabilities, project management capabilities, and the quality of deliverables and outcomes. Please see *RFQ Attachment I. Section 14, Release of Liability.* 

If interviews are required to assist APD with selection for contract negotiations, each Proposer should ensure that its Key Personnel and lead staff of proposed subcontractors to be assigned to APD services attend the interview. Key Personnel must include the proposed Project Manager and/or the proposed point of contact responsible for managing project resources, budget, timeline, deliverables and completion.

APD may select pre-qualified Proposers for contract negotiations without additional selection processes.

For a list of all additional terms and conditions of this solicitation and resulting contract(s) from it, please review:

- RFQ Attachment I: RFQ Terms and Conditions,
- RFQ Attachment II: Contract Monitoring Division Local Business Enterprise (LBE), and
- RFQ Attachment III: City Supplier Administrative Requirements.

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	ECONOMIC	AND WORKFO	RCE DEVELO	PMENT ECN	Dept.	Code: <u>ECN</u>
Type of Requ	ıest:	☑Initial	□Modifica	tion of an exis	ting PSC (PSC#_	)
Type of Appr	oval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)
Type of Servi	ce: <u>Legacy B</u>	Business Progra	m Marketing	and Website		
Funding Sour	ce: <u>General</u>	<u>Fund</u>		PSC	Duration: 4 yea	ars
PSC Amount:	<u>\$141,500</u>					
B. Explain of Per San Fragin Novem communities a tool for continued Registry, the provided to 19/20 would are denied Businesses recovery a hire more	why this servancisco Administration	vice is necessary ninistrative Code ne purpose of the sinesses can be educational and success. To da Small Business onal assistance of e requirement to of Small Busine d per the San Fr the services pro	y and the core sections 2A he Legacy But valuable culd promotion te, five years has over 230 originally into provide pross would not ancisco Administration wided through any more tax	nsequence of co. 242 and 2A.2 isiness Registry Itural assets of all assistance to after the estable Legacy Busine ended. The corromotional assistance to be able to problems to be able to problems and this PSC registrative Coogh this PSC registrative Coogh this PSC registrative coordinates and the coordinates are the able to problems are the coordinates are the coo	denial: 43, which was esty is to recognize in the city. The City of Legacy Busines ablishment of the esses on the Region tract resulting from the promotion is the promotion of the By assisting buest would enable.	d promotional projects website.  Stablished by Proposition that longstanding, y intends the Registry to sees to encourage their e Legacy Business istry but has not yet rom this PSC 49616 – y Businesses. If services al assistance to Legacy usiness with their ole Legacy Businesses to inty of San Francisco,
PSC, at	tach copy of	f the most recei	ntly approve	d PSC.	service was provization, 37211-16	ided under a previous 6/17.
		be renewed? this is intended	d to be a time	e-limited proje	ct.	
E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why. Not applicable						

### 2. Reason(s) for the Request

A. Indicate all that apply (be specific and attach any relevant supporting documents):

☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

B. Explain the qualifying circumstances:

Short-term project requiring diverse skills, experience and/or knowledge. The project requires expertise in marketing, graphic design, project planning and website development.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Required skills and expertise include marketing, graphic design, project planning and website development.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1314, Public Relations Officer; 5320, Illustrator and Art Designer; 5330, Graphics Supervisor;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Regarding website development for the Legacy Business Program, the City's Digital Services team would not undertake the project and advised the Office of Small Business to seek the services of an outside contractor. There currently are no employees in the Office of Small Business or Office of Economic and Workforce Development or other known departments that have the comprehensive skills and the time to perform all elements of this work and all the required tasks.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  Certain classes could perform some elements of this work; however, they lack the comprehensive skill set to perform all the tasks required. In addition, this project is time-limited.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this project is time-limited and requires specific skills.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. Training will not be provided because the skill set is beyond the scope of the City employees involved in the project.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.

- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>07/01/2020</u>, the Department notified the following employee organizations of this PSC/RFP request:

Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness, 5th Floor San Francisco, CA 94103

\*

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49616 - 19/20

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### RE: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

### Timothy Mathews <tmathews@ifpte21.org>

Thu 8/6/2020 1:35 PM

To: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Jenny,

Thank you very much for meeting with me to discuss this PSC. Given our discussion and the downward revision in the amount (included in this resubmission), the Union is able to drop our objection at this time.

Really appreciate the discussion we had with you and Richard.

For the Union,

-Timothy

---

#### **Timothy Mathews**

Pronouns: He/him/his
Research Specialist

#### **IFPTE Local 21**

1167 Mission Street, 2<sup>nd</sup> Floor San Francisco, CA 94103

Office: 415-914-7345

From: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Sent: Friday, July 31, 2020 2:18 PM

**To:** Timothy Mathews <tmathews@ifpte21.org>; Bloom, Marissa (ECN) <marissa.bloom@sfgov.org>; wendywong26@yahoo.com; Kristen Schumacher <kschumacher@ifpte21.org>; L21PSC Review <L21PSCReview@ifpte21.org>; DHR <dhr-psccoordinator@sfgov.org>

Cc: Debra Grabelle <debra.grabelle@ifpte21.org>; Katherine General <kgeneral@ifpte21.org>; LegacyBusiness

(ECN) < LegacyBusiness@sfgov.org>

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hello Timothy,

Both Richard Kurylo and myself are available Tuesday 8/4 after 12:30 for our meeting; shall we say 12:30 via Teams?

### Regards,

\*\*\*\*\*\*\*

Jenny Collins, MSW, Associate Certified Coach Acting Contracts and Grants Manager

(Preferred gender pronouns: she/her/hers)

Office of Economic & Workforce Development

1 South Van Ness Avenue, Fifth Floor San Francisco, CA 94103

Phone: (415) 701-4842 Email: jenny.collins@sfgov.org

www.oewd.org

From: Timothy Mathews < tmathews@ifpte21.org>

Sent: Friday, July 31, 2020 1:09 PM

**To:** Collins, Jenny (ECN) < jenny.collins@sfgov.org>; Bloom, Marissa (ECN) < marissa.bloom@sfgov.org>; wendywong26@yahoo.com < wendywong26@yahoo.com >; Kristen Schumacher < kschumacher@ifpte21.org>; L21PSC Review < L21PSCReview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) < dhr-psccoordinator@sfgov.org>

Cc: Debra Grabelle < debra.grabelle@ifpte21.org >; Katherine General < kgeneral@ifpte21.org >

Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hi Jenny,

Sorry for the delay – this wacky budget season...

How does Monday 8/3, before 2pm, or Tuesday after 12:30pm look for you? I can be flexible.

-Timothy

---

#### **Timothy Mathews**

Pronouns: He/him/his
Research Specialist

### **IFPTE Local 21**

1167 Mission Street, 2<sup>nd</sup> Floor San Francisco, CA 94103

Office: 415-914-7345

From: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Sent: Thursday, July 30, 2020 1:46 PM

**To:** Timothy Mathews < <a href="mailto:timothy-weighte21.org">tmathews@ifpte21.org</a>; Bloom, Marissa (ECN) < <a href="mailto:marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>; <a href="mailto:weighte21.org">wendywong26@yahoo.com</a>; Kristen Schumacher <a href="mailto:kschumacher@ifpte21.org">kschumacher@ifpte21.org</a>; L21PSC Review < <a href="mailto:L21PSCReview@ifpte21.org">L21PSC Review</a> <a

Cc: Debra Grabelle < <a href="mailto:debra.grabelle@ifpte21.org">debra.grabelle@ifpte21.org</a>; Katherine General <a href="mailto:kgeneral@ifpte21.org">kgeneral@ifpte21.org</a>;

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hello Timothy,

I'm following up again to inquire about scheduling a Meet and Confer, if you can please let me know available dates, thank you.

Regards,

\*\*\*\*\*\*\*

Jenny Collins, MSW, Associate Certified Coach Acting Contracts and Grants Manager

(Preferred gender pronouns: she/her/hers)

Office of Economic & Workforce Development 1 South Van Ness Avenue, Fifth Floor San Francisco, CA 94103

Phone: (415) 701-4842 Email: <u>jenny.collins@sfgov.org</u>

www.oewd.org

From: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Sent: Tuesday, July 14, 2020 10:41 AM

**To:** Timothy Mathews <<u>tmathews@ifpte21.org</u>>; Bloom, Marissa (ECN) <<u>marissa.bloom@sfgov.org</u>>; <u>wendywong26@yahoo.com</u> <<u>wendywong26@yahoo.com</u>>; Kristen Schumacher <<u>kschumacher@ifpte21.org</u>>; L21PSC Review <<u>L21PSCReview@ifpte21.org</u>>; DHR-PSCCoordinator, DHR (HRD) <<u>dhr-psccoordinator@sfgov.org</u>>

**Cc:** Debra Grabelle < <u>debra.grabelle@ifpte21.org</u>>; Katherine General < <u>kgeneral@ifpte21.org</u>>

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hello Timothy,

Thank you for our phone conversation in which you explained the next steps of the process. Please let me know your availability to schedule the Meet and Confer, thank you.

### Regards,

\*\*\*\*\*\*

Jenny Collins, MSW, Associate Certified Coach Acting Contracts and Grants Manager

(Preferred gender pronouns: she/her/hers)

Office of Economic & Workforce Development 1 South Van Ness Avenue, Fifth Floor San Francisco, CA 94103

Phone: (415) 701-4842 Email: jenny.collins@sfgov.org

www.oewd.org

From: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Sent: Thursday, July 9, 2020 10:55 AM

**To:** Timothy Mathews <<u>tmathews@ifpte21.org</u>>; Bloom, Marissa (ECN) <<u>marissa.bloom@sfgov.org</u>>; <u>wendywong26@yahoo.com</u> <<u>wendywong26@yahoo.com</u>>; Kristen Schumacher <<u>kschumacher@ifpte21.org</u>>; L21PSC Review <<u>L21PSCReview@ifpte21.org</u>>; DHR-PSCCoordinator, DHR (HRD) <<u>dhr-psccoordinator@sfgov.org</u>>

Cc: Debra Grabelle < debra.grabelle@ifpte21.org >; Katherine General < kgeneral@ifpte21.org >

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hi Timothy,

Thank you for your email, and I would appreciate the opportunity to have a telephone call so that I can learn about the next steps in the process. Today I'm available from 11:30am-1pm or 2-3pm; Friday I have great availability, any time after 9:30am. Please let me know the best number to call you at, thank you.

Regards,

\*\*\*\*\*\*\*

Jenny Collins, MSW, Associate Certified Coach Acting Contracts and Grants Manager

(Preferred gender pronouns: she/her/hers)

Office of Economic & Workforce Development 1 South Van Ness Avenue, Fifth Floor San Francisco, CA 94103

Phone: (415) 701-4842 Email: <u>jenny.collins@sfgov.org</u>

www.oewd.org

From: Timothy Mathews < tmathews@ifpte21.org >

Sent: Thursday, July 9, 2020 10:46 AM

**To:** Collins, Jenny (ECN) < jenny.collins@sfgov.org>; Bloom, Marissa (ECN) < marissa.bloom@sfgov.org>; wendywong26@yahoo.com < wendywong26@yahoo.com >; Kristen Schumacher < kschumacher@ifpte21.org>; L21PSC Review < L21PSCReview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) < dhr-psccoordinator@sfgov.org>

Cc: Debra Grabelle < debra.grabelle@ifpte21.org>; Katherine General < kgeneral@ifpte21.org>

Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Hi Jenny,

Thanks for reaching out – I see the new PSC (#49616 – 19/20) filing.

We understand and appreciate the position you are in and I hope you also see ours, as the Union.

I will reply to the new posting, but the Union must maintain its objection. To contract out bargaining unit work, after five-years of inaction by the Administration to hire the budgeted vacant positions capable of performing this work, especially now during a budget crisis is unacceptable.

Conscious understaffing and under-resourcing a department by the Mayor's office does not constitute a valid reason to subvert the Civil Service Merit system.

Perhaps, you can I can set a quick call to talk about the process and work to schedule an official Meet and Confer (through that process), if y'all wish to proceed.

For the Union,

-Timothy

---

#### **Timothy Mathews**

Pronouns: He/him/his
Research Specialist

#### **IFPTE Local 21**

1167 Mission Street, 2<sup>nd</sup> Floor San Francisco, CA 94103

Office: 415-914-7345

From: Collins, Jenny (ECN) < jenny.collins@sfgov.org>

Sent: Wednesday, July 1, 2020 10:46 AM

**To:** Bloom, Marissa (ECN) < marissa.bloom@sfgov.org>; Timothy Mathews < tmathews@ifpte21.org>; wendywong26@yahoo.com; Kristen Schumacher < kschumacher@ifpte21.org>; L21PSC Review < L21PSCReview@ifpte21.org>; DHR < dhr-psccoordinator@sfgov.org>

Cc: Debra Grabelle < debra.grabelle@ifpte21.org>; Katherine General < kgeneral@ifpte21.org>

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

#### Hello Timothy,

Thank you for your email. We are still hoping to move forward with the PSC authorization, so we have made edits to the DRUPAL entry which we will re-issue today, and we have highlighted here for your reconsideration.

- **Budgeted amount** We have reduced the PSC authorization request from \$300,000 to \$141,500, to match the amount currently budgeted for the project.
- Attempts to source internally We would like to reemphasize that the City's Digital Services Team
  refused to undertake the website development, and advised that we obtain an external contractor
  to perform the work.
- Why not a City employee The required skill set is too unique and broad for any one classification. In addition, due to the time-limited nature of the project, it would not be practical to hire to fill a position for this project.
- Consequences of denial To date, five years after the establishment of the Legacy Business Registry, the Office of Small Business has over 230 Legacy Businesses on the Registry but it has not yet provided the promotional assistance originally intended. The contract resulting from this PSC authorization would satisfy the Administrative Code requirement to provide promotional assistance to Legacy Businesses. By assisting businesses with their recovery and growth, the services provided through this PSC request would enable Legacy Businesses to hire more employees and ultimately pay more taxes and fees to the City and County of San Francisco, aiding the City in its financial recovery.

We appreciate your reconsideration, as well as your protection of City employees. We look forward to your response. Please pardon our unfamiliarity with the Union protest process, and please let us know if there are additional steps we should take in order to reach resolution.

Regards,

\*\*\*\*\*\*\*

Jenny Collins, MSW, Associate Certified Coach Acting Contracts and Grants Manager

(Preferred gender pronouns: she/her/hers)

Office of Economic & Workforce Development 1 South Van Ness Avenue, Fifth Floor San Francisco, CA 94103

Phone: (415) 701-4842 Email: <u>jenny.collins@sfgov.org</u>

www.oewd.org

From: Bloom, Marissa (ECN) < marissa.bloom@sfgov.org>

**Sent:** Tuesday, June 23, 2020 12:22 PM

**To:** Timothy Mathews <<u>tmathews@ifpte21.org</u>>; <u>WendyWong26@yahoo.com</u> <<u>WendyWong26@yahoo.com</u>>; <u>WendyWong26@yahoo.com</u>>; <u>Kristen Schumacher <<u>kschumacher@ifpte21.org</u>>; L21PSC Review <<u>L21PSCReview@ifpte21.org</u>>; Collins, Jenny (ECN) <<u>jenny.collins@sfgov.org</u>>; DHR-</u>

PSCCoordinator, DHR (HRD) < <a href="mailto:dhr-psccoordinator@sfgov.org">dhr-psccoordinator@sfgov.org</a>

Cc: Debra Grabelle < debra.grabelle@ifpte21.org>; Katherine General < kgeneral@ifpte21.org>

Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

Thank you, Timothy -- I have routed this objection to the Program Manager for the Legacy Business program. He is out of the office until Monday, we expect to respond more substantively after that point.

Hooe you are taking good care,

Marissa

\*\*\*\*\*\*\*\*\*

Marissa Bloom

Preferred gender pronouns: she/her

Acting Director, Contracts and Grants Unit Office of Economic and Workforce Development 1 South Van Ness Ave, 5th Floor San Francisco, CA 94103

Direct: (415) 701-4887 Main: (415) 701-4848 Website: <u>www.oewd.org</u> From: Timothy Mathews < tmathews@ifpte21.org >

Sent: Tuesday, June 23, 2020 9:26 AM

To: Bloom, Marissa (ECN) <marissa.bloom@sfgov.org>; WendyWong26@yahoo.com

< WendyWong26@yahoo.com >; wendywong26@yahoo.com < wendywong26@yahoo.com >; Kristen Schumacher

< <u>kschumacher@ifpte21.org</u>>; L21PSC Review < <u>L21PSCReview@ifpte21.org</u>>; Collins, Jenny (ECN)

<jenny.collins@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccoordinator@sfgov.org>

Cc: Debra Grabelle < debra\_grabelle@ifpte21.org>; Katherine General < kgeneral@ifpte21.org>

Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

The Union objects to PSC # 49616 - 19/20. This is Local 21 bargaining unit work and an instruction issued by the Mayor's office is not a valid reason to subvert the City's Civil Service Merit system.

Either this work is essential to the City's operation and the Mayor's Office should have approved the hiring of a Community Development Specialist - 9772, through the Civil Service process; or the work can wait based on the Mayor's instructions.

For the Union,

-Timothy

---

Timothy Mathews Pronouns: He/him/his Research Specialist

IFPTE Local 21 1167 Mission Street, 2nd Floor San Francisco, CA 94103

Office: 415-914-7345

----Original Message-----

From: <a href="mailto:dhr-psccoordinator@sfgov.org">dhr-psccoordinator@sfgov.org</a> On Behalf Of <a href="mailto:marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>

Sent: Monday, June 22, 2020 7:02 PM

To: <a href="marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>; <a href="marissa.bloom@sfgov.org">WendyWong26@yahoo.com</a>; <a href="marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>; <a href="marissa.bloom@sfgov.org">WendyWong26@yahoo.com</a>; <a href="marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>; <a href="marissa.bloom@sfgov.org">MendyWong26@yahoo.com</a>; <a href="marissa.bloom@sfgov.org">marissa.bloom@sfgov.org</a>; <a href="marissa.bloom@sfgov.org">MendyWong26@yahoo.com</a>; <a href="marissa.bloom.org">MendyWong26@yahoo.com</a>; <a href="marissa.bloom.org">Mend

Amihan Milman <a href="mailto:amakayan@ifpte21.org">amakayan@ifpte21.org</a>; L21PSC Review <a href="mailto:L21PSCReview@ifpte21.org">L21PSC Review@ifpte21.org</a>;

Jenny.Collins@sfgov.org; DHR < dhr-psccoordinator@sfgov.org>

Subject: Receipt of Notice for new PCS over \$100K PSC # 49616 - 19/20

RECEIPT for Union Notification for PSC 49616 - 19/20 more than \$100k

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a request for a Personal Services Contract (PSC) 49616 - 19/20 for \$300,000 for Initial Request services for the period 07/01/2020 – 06/30/2024.

Notification of 30 days

(60

days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15108 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# Additional Attachment(s)



# **Request for Qualifications #210**

## **City and County of San Francisco**

Office of Economic and Workforce Development

for

**Consulting Services for Economic and Workforce Development Projects** 



# **Request for Qualifications #210**

Date of Issue: Friday, October 19, 2018

Deadline for Responses:
Thursday, November 15, 2018 by 5:00 PM

1 complete response package may be submitted via email to oewd.procurement@sfgov.org

(Preferred Method)

OR

<u>1 copy</u> of the completed response package including all supplementary materials may be hand-delivered by the deadline or received by OEWD by mail by the deadline at the following address:

Office of Economic and Workforce Development 1 South Van Ness Avenue, 5th Floor San Francisco, CA 94103

**Attention: Contracts and Grants Director** 

HAND DELIVERY RECOMMENDED IF SUBMITTING HARD COPY

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### A. Background

The City and County of San Francisco's Office of Economic and Workforce Development (OEWD) supports the City's ongoing economic and cultural vitality through key programs focused on neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development. OEWD's goal is to work continually, across industries and programs, together with diverse community stakeholders, to make San Francisco a better place to live, work, visit and do business. OEWD seeks to support the economic and community vitality of the City and to create equitable pathways for good paying jobs so that all San Franciscans may fulfill their deepest aspirations and benefit from the economic prosperity of our City. Through this Request for Qualifications (RFQ), OEWD seeks to develop a list of qualified contractors to provide a variety of consulting services, with a focus on advancing equity and shared prosperity for all residents.

### **B. Project Descriptions**

OEWD is seeking to develop a list of qualified contractors to provide a variety of consulting services as described in Section E of this document. Selections for future projects will be based on the competitive qualifications, experience, and hourly rate quoted in the proposals responding to this RFQ. After the pre-qualified list is established, one or more qualified contractors may be asked to provide further details, portfolios of work and additional price information based on the needs of specific projects. Interested parties may submit one response package for consideration under one or more Areas defined in Section E, Scope of Work, below, or interested parties may submit separate proposals for each Area of interest. Please define clearly in the overview of your submission under what Area(s) the package should be reviewed.

Below is an overview of the types of work being sought in this RFQ. Details on each Area can be found in the subsequent pages of this RFQ.

Area number	Title	Subsections/Categories
Area 1	Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	Yes; subsections a. through d.
Area 2	Real Estate Analysis and Technical Assistance	None
Area 3	Community Benefit District/Business Improvement District	None
Area 4	Architectural Services	None
Area 5	Logo/Branding Design	None

Area number	Title	Subsections/Categories
Area 6	Photography Services	None
Area 7	Storefront and Corridor Vacancy Assessment and Feasibility Analysis	Yes; subsections a. and b.
Area 8	Commercial Building Assessment	None
Area 9	Real Estate Case Management Services	None
Area 10	Tenant Coordination/Program Management	None
Area 11	Mission Commercial Space Broker Services and Business Attraction Services	None
Area 12	Chinatown Vacancy Activation Pilot	None
Area 13	Architectural and Interior Design Services for Healthy Retail SF Program	None
Area 14	Small Business Services through the SBDC	Yes; subsections a. through bb.
Area 15	Workforce Technical Assistance and Training	Yes; subsections a. through c.
Area 16	Workforce Policy Tracking and Analysis and Designing Workforce Solutions	None
Area 17	City Build As-Needed Training Consultants	None
Area 18	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 19	Economic and Labor Market Analysis	Yes; subsections a. through b.
Area 20	Development Agreement SharePoint Tracking System	None
Area 21	Technology Consultation	Yes; subsections a. through c.

Area number	Title	Subsections/Categories
Area 22	Stakeholder Engagement and Facilitation	Yes; subsections a. through d.
Area 23	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 24	Fiscal Services	None
Area 25	Legal Advice for Cannabis Equity Applicants	None
Area 26	Small Business Needs Assessment	None
Area 27	Nonprofit Capacity Building	Yes; subsections a. through q.

OEWD may fund contracts and/or grants under this RFQ with a variety of federal, state or local funding as appropriate, including, but not limited to: the Workforce Innovation and Opportunity Act (WIOA), Community Development Block Grant (CDBG), California Career Pathways Trust (CCPT) funds, American Apprenticeship Grants through the Department of Labor, and City general funds.

### C. RFQ Timeline

RFQ Issued	Friday, October 19, 2018
Question submission period ends	Wednesday, October 31, 2018 at noon
Final questions and answers posted	Tuesday, November 6, 2018 by end of day
Proposals Due (no exceptions)	Thursday, November 15, 2018 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Thursday, November 29, 2018
Appeal Period Ends (no exceptions)	Five (5) calendar days after notification date

This RFQ will be in effect for two years from the date that notifications are sent to proposers. OEWD may use this RFQ to justify contracts/grants with a term start date within the two year timeframe and for any necessary amendments to those agreements. The term of any agreements (and their amendments) do not need to conclude within the two year timeframe. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #204 in Spring 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves

for the additional project areas outlined on the following pages or reapply under similar areas to extend their prequalified status. The list of prequalified firms created through RFQ 204 will be active until March 2019. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #207 in Fall 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves for the additional subsections outlined on the following pages or reapply under similar subsections to extend their prequalified status. The list of prequalified firms created through RFQ 207 will be active until October 2019.

# Schedule may change if necessary.

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 210 specific page linked to <a href="https://oewd.org/bid-opportunities/rfq-210">https://oewd.org/bid-opportunities/rfq-210</a> It is the proposer's responsibility to review all changes posted and adjust responses as needed.

# D. Respondents' Questions

Respondents may request clarification or ask questions about this document by emailing <a href="mailto:oewd.procurement@sfgov.org">oewd.procurement@sfgov.org</a> through **October 31, 2018 at noon** (preferred method). Respondents may alternatively drop off written questions to the Office of Economic and Workforce Development, 1 South Van Ness Avenue 5th Floor, San Francisco, CA before the deadline noted above.

No phone or fax questions will be answered. A consolidated list of questions and answers will be posted to the RFQ 210 specific page linked to <a href="https://oewd.org/bid-opportunities/rfq-210">https://oewd.org/bid-opportunities/rfq-210</a> no later than end of day **November 6, 2018**. Periodic posting of questions and answers may occur prior to that deadline. Proposers are responsible to review the website periodically and incorporate guidance as appropriate.

# E. Scope of Work

OEWD seeks to develop a list of qualified consultants in the following areas:

# 1. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan

OEWD is seeking qualified consulting nonprofit and/or for profit firm(s) to: 1) conduct an assessment of department practices regarding racial equity, diversity and inclusion; 2) develop a framework that is built on the central pillars of racial equity, diversity and inclusion; 3) provide training and meeting facilitation on racial equity, diversity and inclusion, and create a plan for subsequent trainings; and 4) develop a Racial Equity Plan based on the framework and assist with implementing the plan across the department's units, programs, policies, and practices.

Activities under this section may include:

## A. Assessment and Evaluation

- Survey and interview all OEWD staff or a diverse subset of staff to assess beliefs, attitudes and practices regarding racial equity;
- Provide a summary of data that protects the identity of individuals who participate;
- Assist in the assessment of components which should be included in a department-wide Racial Equity Plan that will be developed by OEWD's Government Alliance on Racial Equity (GARE) cohort; and
- Assist in the evaluation of OEWD's programs, policies and practices to optimize consistency with the Racial Equity Plan and its principles.

## B. Plan Development

- Develop a framework built around racial equity, diversity and inclusion
- Develop a Racial Equity Plan based on the framework
  - o Plan and program design will have an emphasis on staff development.

# C. Training and Facilitation

- Develop and provide meeting facilitation and training to Racial Equity Working Group members:
- Utilize best practices in establishing a framework which ensures that racial equity, diversity, and inclusion are key values of the department, including developing a shared understanding of key terms and concepts;
- Provide racial equity training and facilitation at all-staff meetings;
- Facilitate the development of a shared vision for a more inclusive and equitable organizational culture; and
- Build staff and organizational capacity, skills and competencies and provide recommendations for developing programs, policies and practices that support and advance racial equity over time.

# D. Implementation

 Provide and develop tools and assist in the operationalization of the tools in the Racial Equity Plan to increase inclusion and racial equity across OEWD's programs, policies, and practices.

# **Minimum Qualifications:**

- Expertise with racial equity, diversity and inclusion focused program design and facilitation, organizational development, human resource management, and research and evaluation services.
- Familiarity with Economic and Workforce development principles and concepts.

# **Preferred Qualifications:**

• Familiarity with the social, physical and economic infrastructure of San Francisco's low-income neighborhoods and communities of color.

## **Supplementary Questions and Requirements:**

- 1. Provide a description of at least 2 similar or relevant projects completed in the last 5 years; include challenges, successes, and impacts of the projects.
- 2. Provide links to websites and/or attach relevant supplemental materials such as a final report on the effectiveness or impact of prior work experience that is relevant to this area.

## 2. Real Estate Analysis and Technical Assistance

OEWD seeks consultants to provide real estate analysis services for commercial and mixed-use projects, including real estate consulting to nonprofit organizations, owners of community assets, and community groups.

- Estimate development and operation and maintenance costs for proposed development projects or portions of mixed-use projects (i.e. commercial portion only)
- Review development proposals and business terms for complex real estate projects
- Assess feasibility of different development finance tools, organizational structures, and proposed tenants/uses
- Perform stakeholder research to inform the evaluation of a proposed development project, a potential partnership, a proposed tenant/user, a development financing tool or organizational structure's feasibility
- Facilitate partnership agreements with developers
- Facilitate financing agreements with funders

- Experience planning or implementing complex mixed-use real estate projects with multiple partners
- Experience estimating costs, developing pro formas, implementing finance tools, and structuring partnerships
- Track record providing assistance or partnering with nonprofit community organizations and neighborhood stakeholders

# **Preferred Qualifications:**

- Track record working in San Francisco neighborhoods on successful commercial and mixeduse projects
- Track record partnering with the City or other public agencies on real estate projects

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 3. Community Benefit District/Business Improvement District

OEWD is seeking Community Benefit District/Business Improvement District (CBD/BID) program support services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. CBDs/BIDs strive to improve the overall quality of life in targeted commercial districts and mixed-use neighborhoods through a partnership between the City and local communities. OEWD offers programs that help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Development of legal documents for forming or renewing districts; including, but not limited to the Management District Plan and Engineer's Report
- Overall management of CBD/BID from renewal through a successful election
- Working with OEWD to determine the effectiveness of the CBD/BID program or individual CBDs/BIDs
- Strategic planning for the CBD/BID program or individuals CBDs/BIDs

- A strong track record of forming and/or managing CBDs/BIDs in San Francisco and/or the State of California
- Previous experience in strategic planning

 Previous experience in reporting the impact and effectiveness of CBDs/BIDs or citywide related programs

# **Preferred Qualifications:**

- Previous work in strategic planning for CBDs/BIDs
- Previous work in reporting the effectiveness of individual CBDs/BIDs and/or citywide related programs
- Registered Supplier with the City and County of San Francisco

# **Supplementary Questions and Requirements:**

- 1. Provide a list of all CBDs/BIDs your organization formed in the City and County of San Francisco and/or the State of California
- 2. Provide links to websites or attach an example of a final strategic plan your organization completed on behalf of a CBD/BID
- 3. Provide links to websites or attach an example of a final report on the effectiveness or impact of individual CBDs/BIDs or on a citywide program.

#### 4. Architectural Services

OEWD is seeking services from architects to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

## Activities under this section may include:

- Attend meetings with small business owners and OEWD staff to discuss the proposed scope
  of work and establish the goals and parameters of the project.
- Review historic information, reports, previous building permits and planning requirements for each project. Conduct field measurements and photographing existing conditions.
- Work with OEWD staff and applicant to develop a minimum of two conceptual designs for the improvements.
- Create design development and construction documents drawings. Coordinate revisions with OEWD staff, applicant and Department of Building Inspection (DBI).
- Obtain all required building permit approvals.
- Develop a scope of work for bidding; attend contractors' walk-through; provide assistance during the bidding phase including responding to questions from contractors.
- Review bids and assisting OEWD staff to provide recommendations on choosing lowest price qualified contractor.
- Provide construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answer questions from contractors and OEWD staff.
- Conduct final walk-through with OEWD staff, contractor and applicant upon project completion. Inspect the work for compliance with applicable City guidelines and signing the Certificate of Completion.

- Five years verifiable experience providing architectural services to small business and/or building owners similar to the services noted in the application section(s) above
- Licensed architect with the State of California.

- Three commercial façade and/or tenant improvement projects completed in the past 5 years.
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
  - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible for a contract award. Please visit http://sfgov.org/olse/prevailing-wage and https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html for more information.

## **Preferred Qualifications:**

Experience working with small business owners unfamiliar with the design process

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 5. Logo/Branding Design

OEWD is seeking services from branding designers to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with the applicant and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Research and evaluate the business concept, customer perception, and other brands in the field.
- Work with OEWD staff and applicant to develop a minimum of three conceptual designs for a visual identity that could include logos, color schemes, signage, and environmental graphics.
- Submit digital files of all designs and a visual identity guideline document for the business.
- Communicate with contractors to specify design and material.
- Providing before and after high quality photographs of the project.

- Five years of verifiable experience and three commercial space branding projects completed within the past five years.
- Experience designing signage.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 6. Photography Services

OEWD is seeking photography services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Conduct and facilitate planning and conceptualization meeting with OEWD staff.
- Review program information, goals, past projects, and communications needs.
- Develop detailed production work plan including shoot times and travel needs.
- Take photos that highlight the work of programs and services to small businesses and commercial corridors.
- Obtain necessary releases from people and property owners included in the shoots.
- Present proof photos for selection by OEWD.
- Edit chosen photos for photo retouching and file conversion to attain the standard and quality required by OEWD.
- Deliver digital files of final images by method approved by OEWD.

## Minimum Qualifications:

 Five years verifiable experience providing photography for events, real estate, non-profit, and/or commercial purposes.

## **Preferred Qualifications:**

- Experience working with small business owners.
- Experience working in San Francisco neighborhoods and commercial corridors.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 7. Storefront and Corridor Vacancy Assessment and Feasibility Analysis

OEWD seeks economic consulting services to assess corridor and storefront vacancies to inform City engagement to activate commercial storefronts.

- A. Storefront Vacancy Assessment and Feasibility Analysis (single storefront)
  - Use observation and key informant interviews (i.e. broker, building manager or landlord) to determine why a space is vacant. The possible factors will be provided by OEWD as a template.

- Use observation and findings about the neighborhood, including adjacent and nearby businesses, to assess the feasibility of the proposed or projected type of business that would occupy the space.
- Write up summary, including list of business types with the highest likelihood for sustainable success, and activation recommendations.

# B. Corridor Vacancy Assessment

Use vacancy data and additional data and interviews to analyze a corridor's general
conditions, its uses and makeup, existing building/use (sq. ft.) inventory, and vacancies,
and determine whether it is a problem and whether it is an opportunity for
government intervention to solve.

# **Minimum Qualifications:**

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- At least three years of experience conducting similar assessments surveying and researching
- Analyzed neighborhood and/or regional economic composition, industry clusters, or local factor conditions
- Performed quantitative or qualitative market research in neighborhoods
- Researched and analyzed real estate market conditions and trends, performed stakeholder interviews and research

# **Supplementary Questions and Requirements:**

1. Please describe your understanding of what these assessments may include and for what purpose.

# 8. Commercial Building Assessment

OEWD is seeking commercial building assessment services to support a business attraction storefront activation program.

Activities under this section may include:

- Conducting site visits
- Determining infrastructure needs (mechanical, electrical, plumbing, accessibility, life safety compliance requirements, etc.) to bring the building up to date and to code to be marketable.
- Providing costs estimates of necessary improvements

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience inspecting and providing assessment of commercial real estate property in San Francisco to determine structural and building systems issues including at a minimum assessment of the building's exterior, electrical, plumbing, HVAC, systems and structural elements
- Experience providing construction cost estimates in San Francisco

## **Preferred Qualifications:**

• Certified commercial property inspector with experience in San Francisco.

# **Supplementary Questions and Requirements:**

1. Please provide an example of commercial building assessment that you have performed for a building in San Francisco.

# 9. Real Estate Case Management Services

OEWD seeks commercial real estate broker services to support a storefront activation and retention program.

Activities under this section may include:

- Work with OEWD to identify and prioritize storefronts to activate
- Work with landlords to fill vacant storefronts.
- Assist tenant pipeline businesses in representing them, negotiating leases, assessing zoning and permitting, and drafting letters of intent.
- Assist existing businesses in representing them, negotiating leases, and drafting letters of intent.
- Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.

# **Minimum Qualifications**:

- At least three years of experience providing real estate or broker services for commercial properties.
- Success providing real estate services to small businesses with varying needs.
- Experience working in San Francisco neighborhood commercial real estate market

## **Preferred Qualifications:**

California licensed real estate broker

## **Supplementary Questions and Requirements:**

- 1. Describe recruitment methods for attracting neighborhood serving businesses.
- 2. Describe how you interpret broker services and business attraction services.
- 3. Describe accomplishments and successes in supporting small businesses within San Francisco
- 4. Describe your experience in negotiating leases and drafting letters of intent
- 5. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
- Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
- 7. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

#### 10. Tenant Coordination/Program Management

OEWD is seeking a project manager to provide direct real estate services and manage a program that coordinates and supports storefront activation services.

# Activities under this section may include:

- Partner and work closely with City team and neighborhood stakeholders to identify neighborhood business retention and attraction efforts and priorities.
- Coordinate with OEWD to prioritize corridors and storefronts for activation and retention based on assessment reports
- Facilitate coordination with Community based organization partners, vacancy assessments, and real estate brokers.
- Conduct direct, proactive, iterative business outreach to businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco
- Provide real estate services and direct case management for up to 25 storefronts
  - Assist businesses in representing them, negotiating leases, and drafting letters of intent.
- Coordinate Tenant Pipeline
- Maintain and manage a pipeline of vacant commercial storefronts. Various sources exist
  to collect vacancy information, but maintaining and becoming familiar with key and
  important vacancies will be important to filling them.
- Coordinate within OEWD, other City agencies, and grantee organizations to share vacancies with their clients who are seeking new spaces
- Consider creating a new clearinghouse for temporary or "pop up" users of commercial space
- Assess prospective tenants in leveraging existing service providers
- Assist with Existing Business Retention efforts
- Manage a list of priority businesses for retention services.
- Leverage existing programs to remove leasing barriers and incentivize business owners and property owners to agree to lease terms.

# **Minimum Qualifications:**

- Experience working with real estate, construction-related parties, including but not limited to architects, designers, landlords, brokers, contractors, small business tenants, and City permitting agencies, to fill a vacant storefront.
- Minimum 3 years in real estate experience working with small businesses.

# **Preferred Qualifications:**

# **Building Assessments**

• Certified commercial property inspector with experience in California.

## **Real Estate Services**

- California licensed real estate broker
- Five or more years in real estate matching experience working with small businesses

## **Supplementary Questions and Requirements:**

1. Describe a program or project you have managed that involves multiple stakeholders and involves real estate matters.

- 2. Describe how you interpret broker services and business attraction services.
- 3. Describe accomplishments and successes in supporting small businesses within San Francisco
- Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
- 5. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

# 11. Mission Commercial Space Broker Services and Business Attraction Services

OEWD is seeking proposals for a nonprofit or for profit organization to partner with OEWD to support commercial space broker services and business attraction in the Mission District with a focus on Mission Street and 24<sup>th</sup> Streets. The vision for the future of the Calle 24 Commercial Corridor is that it will be an economically vibrant community that is inclusive of diverse income households, businesses and institutions that preserve the cultural and historic integrity of the neighborhood commercial district. In addition Mission Action Plan 2020 produced by the Planning Department states that the goal for Economic Development strategies are to stem the loss of and promote community businesses that serve low to moderate income households.

OEWD recognizes that in order to realize this vision the work must be community-led with a strong private-public partnership. OEWD is seeking proposals to hire a consultant to conduct commercial space broker and business attraction services to ensure a viable pipeline of neighborhood serving businesses into existing and future storefront vacancies.

Please refer to referenced Mission strategies; in addition you may refer to Mission
District Economic Development Reports links on our website: https://oewd.org/reports-and-plans

A strong proposal shall demonstrate:

- Knowledge of Mission Action Plan 2020 led by the Planning Department and Calle 24 Latino Cultural District economic development goals and priorities
- Knowledge of economic development activities in the Mission
- A supportive structure that will guide and support a consultant to conduct the work

The budget may reflect compensation for the consultant position as well as operational activities.

The scope of work for the grant recipient(s) in this program area may include (but is not limited to) the following activities:

- Manage a list of new viable businesses to fill existing and upcoming vacancies
- Develop and manage relationships with property owners, businesses and community partners that maintain a pipeline of businesses for vacancies
- Assist pipeline businesses in representing them, negotiating leases and formulating letters of intent
- Collect and report on real estate market trends and prices for the area
- Leverage resources to support business in securing location
- Assist existing businesses in lease review and negotiating leases
- Assist businesses in connecting with partners, so they can be an accessible place for the low to moderate income community
- Maintain communication and report to OEWD and partners

- Communicate activities, milestones, accomplishments and areas of concern or need for strengthening
- Ensure activities are aligned with Calle 24 Latino Cultural District and Mission Action Plan 2020 Economic Development priorities

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- List prior experience in order to be a qualified applicant.
- A track record of success working in the Mission neighborhood
- Bilingual capabilities English/Spanish

# **Preferred Qualifications:**

• Experience partnering with businesses, nonprofits, residents and the City to implement cultural and/or economic development strategies.

# **Supplementary Questions and Requirements:**

- 1. Describe recruitment methods for attracting neighborhood serving businesses.
- 2. Describe how you interpret broker services and business attraction services support Calle 24 Latino Cultural District and Mission Action Plan 2020 economic development goals.
- 3. Describe proposed indicators that will be used to show progress of services
- 4. Describe accomplishments and successes in supporting small businesses within the Mission District
- 5. Describe your experience in negotiating leases and drafting letters of intent
- 6. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
- 7. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
- 8. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in the Mission.

# 12. Chinatown Vacancy Activation Project

Proposals are being sought by OEWD from nonprofit organizations to address storefront vacancies in Chinatown by identifying storefront vacancy best practices; developing storefront activation strategies; and implementing individualized action plans. Strategies are intended to reduce commercial vacancies, recruit new businesses, enhance the marketing of vacant spaces, facilitate lease negotiations, assist with permitting processes, and generally improve the neighborhood vitality in the Chinatown commercial corridor.

The scope of work for the selected nonprofit organization in this program area may include, but is not limited to the following:

- Developing tenant attraction strategies or storefront activation strategies that center around Chinatown's unique character, needs and challenges
- Including local stakeholders, merchant associations, and business and property owners in identifying and prioritizing needs and risks in action planning
- Implementing individualized action plans for vacant storefronts to attract tenants or program the space for temporary activations during tenant transition periods

- Managing a mini-grant program (two-thirds of budget) that provides legal and/or permitting assistance
- Utilizing linguistically- and culturally-appropriate tools and resources in association with developing strategies and implementing action plans

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco
- Experience developing corridor improvement strategies and implementing action plans
- Experience administering city-funded economic and/or workforce development programs
- Established relationships with local stakeholders, merchant associations, business and property owners

# **Preferred Qualifications:**

Qualified staff with knowledge of commercial leasing and business accounting

# **Supplementary Questions and Requirements:**

- 1. What experience does your organization have developing corridor improvement strategies? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
- 2. What experience does your organization have administering City-funded economic and/or workforce development programs? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
- 3. Provide a list of local stakeholders, merchant associations, business and property owners with which your organization has established relationships.

# 13. Architectural and Interior Design Services for Healthy Retail SF Program

OEWD is seeking services from architects to be primary contact for the store operator for store reset/redesign activities. Architect would collaborate with OEWD and the San Francisco Department of Public Health (SFDPH) to ensure corner stores have the opportunity and support needed to provide healthier options such as fresh produce, low salt and sugar alternatives, etc. by initiating contact with the store operator to redesign stores through the Healthy Retail SF Program.

- Ensuring corner stores have the opportunity and support needed to provide healthier options in two main areas:
  - Physical Changes (i.e. equipment such as produce refrigeration, shelving)
  - Business Operations (i.e. securing loans, Point of Sale system support, providing trainings & other resources)
- Assessing potential stores interested in the program for viability

- Attending meetings with the business and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Reviewing historic information, reports, previous building permits and planning requirements for each project. Conducting field measurements and photographing existing conditions.
- Creating design development and construction documents drawings/schematics.
   Coordinating revisions with OEWD staff, business and Department of Building Inspection.
- Obtaining all required building permit approvals.
- Providing construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answering questions from contractors and OEWD staff.
- Creating or providing visual signage that promotes healthy products in participating stores
- Maintaining a comprehensive budget and work plan
- Coordinating store reset/redesign activities with members of the Healthy Retail SF Program team (OEWD, Consultants and others) to include:
  - Order/purchase all necessary equipment for store reset/redesign
  - Communicate necessary information between OEWD, Store Operator, and the community
  - Take pre/post reset/redesign photos
  - Planning and coordination of the schematic/reset planning meeting(s)
  - Schedule and coordinate meetings between the produce consultant, store owner and others to conduct trainings about produce maintenance and merchandising.
  - Help develop and monitor the activities of the Individual Development Plan (IDP),
     related to the Physical Environment of the store, including but not limited to:
    - Assist with planning of a launch/Grand Re-Opening Event
    - As needed, provide information to report cards and provide input into yearly IDPs
    - Monitor any additional physical requirements specifically identified in the IDP, such as ensuring participating store has proper electrical outlets, storage space, etc.
    - Assist the store operator in the ordering and sourcing of fruits and vegetables and the appropriate products based on customer surveys conducted in the participating stores' community.
    - Coordinating and providing additional equipment, technical assistance and/or support (if appropriate) as part of participating stores' annual incentive

- Experience with Architectural and Interior Design Services
- Providing before and after high quality photographs and measurements of the project
- Experience working with small market and corner store operators
- Ability to invoice monthly
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
  - o If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible

for a contract award. Please visit http://sfgov.org/olse/prevailing-wage and https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html for more information.

## **Preferred Qualifications:**

- Providing construction administration service
- Design assistance to improve visual identity, commercial façades, and business interiors to help small businesses
- Providing technical assistance to City of San Francisco (City) staff members, and property and business owners

# **Supplementary Questions and Requirements:**

- 1. Please provide examples of similar projects worked on and completed.
- **2.** Outline the process to complete the project, steps taken to address challenges and how successes were celebrated.

# 14. Small Business Services through the Small Business Development Center (SBDC)

The San Francisco Small Business Development Center (SBDC), a program within OEWD, is seeking business consultants to provide business counseling and training services. Specifically, SBDC is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations:

- a. advertising, marketing, sales and branding
- b. commercial lease negotiations
- c. small business establishment and formation
- d. contracting
- e. customer creation and retention
- f. financial management and analysis
- g. franchising
- h. human resource management
- i. inventory management
- j. loan packaging
- k. product development
- profitability tactics
- m. social media management
- n. space planning and analysis
- o. visual merchandizing
- p. technology
- q. web and graphic design
- r. strategy
- s. accounting and bookkeeping
- t. business taxes
- u. government contracting
- v. importing/exporting
- w. financing/capital
- x. commercial real estate
- y. e-commerce
- z. grant writing

- aa. Industry specific expertise (i.e. manufacturing, restaurant, retail...etc.)
- bb. Produce handling and marketing

# Activities under this section may include:

- Developing and conducting training programs for small businesses in 1:1 and/or group settings.
- Directing small business clients to appropriate business resources for their needs
- Coordinating and maintaining regular contact with OEWD staff and the SBDC director
- Developing individual service plans and scopes of work for clients
- Tracking and reporting on economic impact of the work being provided

#### Additional information for this Section:

- Services may be required to be provided in a variety of languages including Spanish, Tagalog, Traditional Chinese, and other languages as needed.
- Some services may be required to be provided in the evenings or on weekends to accommodate client needs.
- The SBDC has a standard \$70 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hours)

## Minimum Qualifications:

 3 years verifiable experience providing business consulting and training services to small business clients <u>and</u> a minimum of 10 small business clients consulted and/or trained

<u>Supplementary Questions and Requirements</u>: Please answer the following questions and provide samples of work as part of the response package.

- 1. Explain your ability to develop and conduct training programs.
- 2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
- 3. Describe your knowledge of appropriate business resources to which business owners would be directed.
- 4. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
- 5. Indicate the languages you speak and the proficiency with which you speak them:
  - a. Level 1 Elementary proficiency
  - b. Level 2 Limited working proficiency
  - c. Level 3 Professional working proficiency
  - d. Level 4 Full professional proficiency
  - e. Level 5 Native or bilingual proficiency
- 6. Describe your rapport or approach with clients. How do you communicate effectively with entrepreneurs and engage the cooperation of business owners in the implementation process?
- 7. Describe your success in helping business clients accomplish specified goals.
- 8. What knowledge and experience do you possess for dealing with clients' technical problems and producing results of a desired level? Please provide specifics related to all Area 3, subareas a through bb for which you would like this application to be considered.

- 9. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
- 10. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour?
  - a. Yes
  - b. Yes for some but not all contracts (Please answer question below)
  - c. No (Please answer question below)
    - i. If you are not willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour, what is your blended hourly rate?

# 15. Workforce Technical Assistance and Training

OEWD seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming.

Activities under this section may include:

# A. Workforce Development Program Design

Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed.

Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning assessments, apprenticeship, learning labs and learning networks, and innovation process strategies.

# B. Training and Technical Assistance on Regulatory Compliance

Providing technical assistance and training to service providers on administrative compliance with the State and Federal fund sources with an emphasis on Workforce Innovation and Opportunity Act (WIOA) funds and appropriate activities

## C. Training of Best Practices in Workforce Development

Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas:

- Implementing workforce development best practices
- Client customer service motivational interviews and strength-based interviews
- Effective case management to enhance participant success
- Competency based assessments
- Retention best practices
- Strategies for effective job development and employer engagement
- Strategies to utilize external resources outside of workforce system to support clients
- Using Labor market Information (LMI) to best inform programming

- Common measures to identifying "job readiness" across workforce system
- Innovation to incentivizing participants to submitting required documentation (i.e. employment/education verification)
- Employment matching based on skills, interests and sustainable wage occupations
- Strategies for removing employment barriers

#### Additional Information for this Section:

Audience may be as large as 100 and from a variety of levels (direct staff, management and leadership) within OEWD-funded workforce system service providers.

Applicants should demonstrate in their response the following specifics in regards to capacity building and training around workforce development:

- A successful track record providing assistance to workforce community organizations
- Success in increasing capacity of community organizations and their staff
- A successful track record working with low-capacity organizations
- A successful track record on providing trainings on workforce best practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies
- Experience in developing and facilitating training curriculum around workforce development best practices

# **Minimum Qualifications**:

• Minimum of 5 years verifiable experience providing similar services (capacity building and training of workforce best practices) as those noted in the application area.

# **Preferred Qualifications:**

Experience in providing similar services to workforce providers in San Francisco

<u>Supplementary Questions and Requirements</u>: Please answer the following questions and provide samples of work as part of the response package.

- 1. Please provide an example of capacity building efforts with low capacity organizations.
- 2. Please provide examples of trainings you provided around workforce best practices.
- 3. Please provide 2 letters of recommendation from workforce organizations for whom you have provided capacity building.

## 16. Workforce Policy Tracking and Analysis and Designing Workforce Solutions

OEWD seeks consultants to track policies developing at the Federal or State level that effect or could influence San Francisco's Workforce System, particularly as it relates to changes in funding for Workforce Development; new initiatives within Workforce Development at the State or Federal level; changes in legislated hiring or other HR requirements impacting employers; new or different regulations impacting the hospitality, technology, construction, or healthcare industries; credentials and/or certifications being developed for new and emerging industries relevant to the San Francisco labor force; etc.

- Providing research on policy, funding, and legislative changes impacting Workforce
  Development on the Federal and State Level, particularly (but not exclusively) those of
  WIOA.
- Tracking proposed funding changes, program planning requirements, and workforce related regulations in key sectors that will assist San Francisco's workforce system manage local in a way that best serves job-seekers and employers.
- Conducting research on the value of certificate programs versus college degrees for growth sectors like technology and advanced manufacturing.
- Researching on best practices and models developed in peer cities designed to address
  poverty and high unemployment in cities with great wealth disparity.
- Creating recommendations for implementing workforce policies and suggest directives to guide local programming; simplify local directives and policies so they can be shared and implemented by local system workforce providers.
- Researching the impacts of Artificial Intelligence (A/I) and Robotics have on the workforce, and in particular industries, and what training needs to be in place for entry level positions in those sectors.
- Tracking the efforts of the newly formed American Workforce Policy Advisory Board.

 Minimum of 5 years verifiable experience providing similar services (policy tracking and analysis) as those noted in the application area

# **Preferred Qualifications:**

Applicants should demonstrate in their response the following specifics in regards to workforce development policy tracking and analysis:

- Demonstrated understanding of workforce development policy landscape at the State and Federal level
- Established expertise in labor market and industry-driven credentialing programs
- Verifiable experience in providing policy analysis, best practices, comparative analysis,
   etc. for workforce development policy and legislation at the local, state, or federal level
- A successful track record of quantitative and qualitative analysis of industry and occupational trends that predict changes in hiring and HR practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 17. City Build As-Needed Training Consultants

OEWD seeks consultants to provide technical assistance to help craft and implement construction training curricula for as-needed CityBuild special trainings, including project-specific trainings such as the 2017 and 2018 Chase Center Trainings.

- Working with OEWD and CityBuild staff to develop detailed curricula for construction training modules tailored to meet industry and project-specific needs
- Assisting OEWD and CityBuild in implementing the Multi-Craft Core Curriculum in asneeded trainings

- Coordinating with jointly-administered apprenticeship programs to match training curricula to meet direct entry and preferred entry requirements
- Delivering construction training services at CityBuild-specified sites in the City and County of San Francisco

Additional information for this Section: Applicants should demonstrate in their response the following specifics::

Applicants should demonstrate in their response the following specifics: a successful track record providing assistance to OEWD, CityBuild, or any other Workforce Investment Board-affiliated preapprenticeship program in the nine-county Bay Area; a successful track record working in San Francisco; and a successful track record training disadvantaged jobseekers for success in jointly-administered training programs.

# Minimum Qualifications:

- 3 years verifiable experience providing similar services as those noted in the application area
- Experience in delivering the Multi-Craft Core Curriculum is highly desired, though not required

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 18. Employment Training Panel (ETP) Technical Assistance and Management

OEWD is seeking consultants to assist the department with the administration of existing and future California State Employment Training Panel (ETP) grants.

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training.
- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.

- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.
- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their

- 5 years verifiable experience in providing similar services as those noted in the application area above.
- Specific workforce development related experience is highly desirable.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 19. Economic and Labor Market Analysis

OEWD seeks consultants to provide Economic and Labor Market Analysis consulting.

Activities under this section may include:

# A. Workforce Development

OEWD is seeking consultants to provide economic consulting for labor market analysis. Consultants in this service are will help OEWD make informed plans, choices, and decisions for a variety of purposes, including informing business investment decision making, career planning and preparation, education and training offerings, job search opportunities, hiring strategies, and public workforce investments. Among other tasks, consultants may be asked to review and analyze labor market data in order to identify emerging sectors, understand the health of existing sectors, identify where workforce investments are warranted, and measure changes in sector health in areas receiving City workforce investments.

The requested services may include analysis of community workforce skills and capabilities, employment opportunities and projections, skills and competencies required, career lattices, and sector/industry specific career development opportunities. The consultant may analyze current workforce development practices and make recommendations for industry-specific programming. These services may have a local, state, or nationwide focus, and will based on research, labor market analysis, and stakeholder engagement (City, education, labor, etc.).

The consultant may also perform statistical analysis of employee wage data within or across sectors, industries, or employers, employee wage data for disparities based on race/ethnicity, gender, and/or race and/or gender-based discrimination among employees within or across sectors, industries, or employers.

The consultant may produce relevant reports, charts, tables, and other data visualization products. Firms may be asked to evaluate proposed intervention strategies for OEWD based on labor market projections and existing or planned training practices.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, workforce development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

# **B.** Economic Development

OEWD is seeking consultants to provide economic consulting for economic development. Consultants in this service area will help OEWD conduct economic development analyses of local and/or regional markets, including analysis of economic, real estate, and industry/sector factors.

The requested services may include economic development strategy development, business attraction and retention, neighborhood and/or regional economic composition and performance, surplus and leakage analysis, sector analysis, analysis of local factor conditions, and small business and neighborhood corridor best practices. These services may have a local, regional or nationwide focus, and will based on research, analysis, and stakeholder engagement.

Among other tasks, consultants may be tasked with survey design and implementation, stakeholder engagement, performance measurement, and make recommendations for industry- or neighborhood-specific programming. The consultant may be tasked with program implementation or marketing. The consultant may be asked to produce relevant reports, charts, tables, and other data visualization products.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, economic development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic development strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

## **Minimum Qualifications:**

 3 years verifiable experience in providing similar services as those noted in the application area above.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 20. Development Agreement SharePoint Tracking System

OEWD seeks consultants to provide technical assistance to build a SharePoint-based centralized multi-agency Development Agreement (DA) Obligations Tracking System which would track requirements in these unique agreements so that the City can more easily monitor and track these obligations. DAs are legal agreements between the City and private entities approved by the Board of Supervisors. OEWD seeks to develop this singular, comprehensive system to house and organize the conditions, requirements and mitigations specified in DAs. To this end, OEWD seeks to develop a website to house approved agreements and a centralized database system embedded there for tracking and enforcing DAs. In order to be effective as a tool for monitoring and enforcing DAs, the

SharePoint system should include a database management system that has several characteristics. Specifically, the database should:

- Be easily and conveniently accessible to users in multiple departments;
- Be flexible and robust enough to accommodate the wide variety and complexity that exists among DA requirements;
- Have advanced features such as custom reporting and automation of certain tasks (e.g., email notification of deadlines and milestones); and
- Have security and access controls adequate to preserve the integrity of the data.

# Activities under this section may include:

- Scoping meetings: Conduct one-on-one technical sessions with staff from OEWD and six to eight participating agencies to develop custom applications and functions/procedures for the purpose of interfacing with a centralized database for tracking and enforcing the conditions, requirements, mitigations, and obligations.
  - Building the tracking system: Working directly with an OEWD project manager, draft the system and make adjustments, as necessary. Assist with integration directly with FAMIS/FSP, Accela PPTS, mapping software, City Outlook
     Directory, and other applicable systems, as necessary, or indirectly through data exporting/importing. Create and adhere to a project schedule for building and launching this system.
- Roll-out: Launch the new DA Obligations Tracking System. Provide on-going support and development through beta-testing.
  - Designing maintenance protocols: Draft protocols for OEWD and other stakeholders to utilize after roll-out stage. Develop department-specific work flows for custom reporting and automation of tasks. Create security and access controls to allow for the adequate preservation of integrity of inputted data. Build document management capabilities to upload and retrieve relevant files.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record in organizing and facilitating multi-stakeholder projects
- Technical expertise needed for all aspects of building the DA Obligations Tracking System

## Minimum Qualifications:

- Three years verifiable experience providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar SharePoint obligationtracking systems/databases.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

# 21. Technology Consultation

OEWD seeks consultants to design, develop, and deploy computer solutions to reduce costs, increase access, and improve outcomes.

Activities under this section may include:

- A. As-needed Technology Consultation services including:
  - Assisting with identifying, purchasing and implementing new systems or upgrades to current systems
  - Developing electronic forms and workflows to support process automation
  - Integrating data from other systems as necessary to support process automation and reporting
  - Analyzing of business practices and associated tracking mechanisms, to include identification of current-state efficiency gaps and future-state recommendations.
  - Data de-duplicating and clean-up.
  - Collecting, documenting, and confirming functional requirements.
  - Creating, customizing, deploying or providing recommendations on technical and procedural systems for improved information sharing.
  - Automating of core departmental processes.
  - Creating, customizing, deploying or providing recommendations on technology solutions to integrate and consolidate current OEWD systems.
  - Providing end-user training and creating guide materials related to improvements.
- B. Developing a cloud-based, interactive data management system to track workforce-related data, specific to the construction Industry. System includes a project management tool, and the ability to track worker demographics and employer information. The system should allow users to generate customizable reports to view all data points and its relationships, with ability to export raw data as Excel and PDF file formats.
- C. Improving and expanding job-matching technology for the workforce portfolio. Improve and expand existing Salesforce-based job matching tool focused on connecting prequalified job seekers with employment opportunities.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

 A successful track record partnering with the City or other public agencies; the City currently uses the following system as part of its business operations: PeopleSoft, MS Office, SharePoint, DocuSign, Tableau, ArcGIS, Adobe, Drupal

## **Minimum Qualifications**:

• 5 years verifiable experience providing similar services with systems as those noted in the application area(s) above.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 22. Stakeholder Engagement and Facilitation

OEWD is seeking consultants to provide stakeholder outreach, engagement, and facilitation services for external-facing events, as well as facilitation services (both internal and external) related to event planning, promotion, retreats, and day-of event support. Services include, but are not limited to managing engagement processes and data collection plans, reporting results and

recommendations, and managing collaboration and partnership between stakeholders and members of the public.

- A. Stakeholder Outreach Services. Firms prequalified for work in this Service Area may be requested to provide outreach services to stakeholders (e.g., staff, customers/users, community groups, Board of Supervisors, City commissions, general public). Services may include, but are not limited to, designing, producing, managing outreach tools and strategies, presenting, and providing technical assistance, such as:
  - Designing, developing, and implementing multi-media promotion strategies
    - Electronic outreach (e.g., e-newsletters, project websites)
    - Social media (e.g., Facebook, Twitter, blogs, cell phone apps)
    - Print and other promotional material: (e.g., mailings, reports, posters, advertisements, signage, etc.)
  - On-the-ground community outreach (e.g., tabling at community events, attending community groups' meetings, door-to-door flyering)
  - Media relations (e.g., media advisories, TV/radio/billboard advertisements, ethnic news media outreach)
    - Development and distribution of press releases
  - Communication plans
  - Translation and interpretation for non-English speaking populations. If applicable, respondents should make sure to indicate in which language(s) they are able to offer outreach services.
- B. Stakeholder engagement, research, and analytical services. The purpose of these services is to collect, analyze, and use stakeholder input to inform city departmental planning, decision-making, and process improvement efforts. Services may include, but are not limited to, the following:
  - Design, conduct, and manage data collection plans to collect input from stakeholders using data collection methods, such as:
    - Surveys (e.g., online, mail, phone, in-person)
    - Opinion polling (and other large, random sample, statistically significant surveying)
    - Focus groups: for the purpose of collecting input and ideas from stakeholders as well as capturing different opinions and necessary information.
  - Design, conduct, and manage data analysis plans to analyze stakeholder input:
    - Collect, compile, and transmit data into usable formats
    - Develop and execute data analysis using quantitative and qualitative methods
    - Create data analysis reports, including summary reports and detailed final reports, and display results in various formats, e.g., PowerPoint, interactive/web-friendly,
    - Develop recommendations and implementation plans based on findings and analysis
    - o Present findings and recommendations to staff, commissioners or elected officials
    - Design, conduct and manage secondary research and data analysis to support primary research methods and findings, e.g., literature review, contextual research, market research, GIS mapping, US census data analysis.

- Conducting interviews with targeted employers or industry groups to obtain information on how to best position marketing initiatives and communicate benefits to the business community.
- Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- C. Facilitation services between stakeholders and/or to provide assistance at public-facing events. The purpose of this service is to encourage collaboration and partnership between stakeholders, large working groups, and members of the public. Services may include, but are not limited to, the following:
  - Planning, coordinating, and managing meetings and workshops between stakeholders, including but not limited to:
    - Working groups; for the purpose of creating recommendations and identifying solutions around a subject area or issue.
    - Conducting Stakeholder strategic planning sessions
    - Designing, conducting, and managing stakeholder facilitation processes, including coordination, communication, strategic advising, consensus-building, and conflict resolution services.
  - Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- D. Facilitation of groups with a focus on retreats, focus groups, and working group conferences and/or large scale project management with an emphasis on event planning, promotion, and day-of support.

Activities under this section may include:

- Creating and presenting retreat plans, agenda and materials for Department, board, or commissions
- Facilitating capacity building workshops for workforce professionals and organizations
- Logistics planning and coordination
- Creating, presenting, tracking, and analyzing pre and post group survey materials
- Obtaining, analyzing and reporting on direct feedback from participants as well as setting
  effectiveness measurement systems to develop strategies for continual process
  improvement and improved efficiencies
- Summarizing proposed recommendations, including specifying measurable objectives, timeframes, and key personnel
- methods of implementing these recommendations, and ways to measure progress and provide updates
- Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.

# **Minimum Qualifications**:

 Respondents must have experience working with municipalities (or similar government agencies) on stakeholder outreach, engagement, facilitation and/or related research and analysis.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 23. Marketing, Branding, Collateral and Website Development

OEWD is seeking consultants to assist with establishing consistent and effective messaging among OEWD's programs and initiatives.

Activities under this section may include:

- a. Analyzing stakeholders and how they affect messaging across all channels (website, print collateral, social media, etc.).
- b. Analyzing and providing recommendations about how, through messaging and information design, OEWD can create better access to OEWD services for San Francisco residents, including underserved populations. This may include strategy for creating print and web materials that are user/customer focused. Provide OEWD with manual of best practices on how to create user/customer centered content.
- c. Designing research and analysis to better understand our customers/clients, including current challenges and barriers, socioeconomic context, etc.
- d. Data visualization
- e. Creating, presenting, implementing, and analyzing the effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- f. Analyzing current web, digital, and/or paper collateral and recommendations for additional pieces to effectively market services to the public, other City departments, and community stakeholders.
- g. Branding strategy to better integrate OEWD messaging and design across all channels (print, digital, social media, etc.) This may include design of logos, collateral, style guidelines, and other support materials to market services to the public, other City departments, and community stakeholders.
- h. Photographing events, programs, clients, and service providers for print and online marketing
- i. Analyzing of stakeholders and how they affect messaging in all available media (website, print collateral, etc.).
- j. Creating, presenting, implementing, and analyzing effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- k. Creating, implementing, and potentially consolidating appropriate website(s) to market services to the public, other City departments, and community stakeholders.
- Designing and producing logos, collateral, and other support materials to market services to the public, other City departments, employers and community stakeholders.
- m. Developing a Content strategy and developing print and web materials that are user/customer focused. Provide OEWD with manual of best practices for creating user/customer centered content.
- n. Creating a unified OEWD Workforce Development brand and graphic system for collateral across print, digital and social medial channels.
- o. Conducting door-to-door outreach to disseminate information about OEWD
- p. Developing a Marketing and Branding Strategy Plan that includes:
  - A Style & Marketing Guide (these could be two separate activities)
  - Marketing Toolkit
  - Strategy for outreach to employers, providers, job seekers and other stakeholders through print, digital and social media channels

• Three years verifiable experience providing similar services as those noted in the application area.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 24. Fiscal Services

OEWD seeks consultants to assist OEWD directly, individual grantees, or other system service providers which the department deems in need of assistance with fiscal operations.

Activities under this section may include:

- Training and coaching staff and leadership to improve fiscal operations of the designated organization.
- Reviewing, analyzing and documenting current practices; updating policy and procedures as necessary.
- Reviewing monthly invoices from grantees against Federal, State, local or other applicable regulations to confirm funding is being spent according to appropriate requirements.
- Developing or revising fiscal policies and procedures for administration of federal workforce funds, local city grant dollars, or a combination of both.
- Developing or revising cost allocation plans and functional budgets in partnership with one or more nonprofit agencies receiving a variety of Federal, State and local funding.
- Technical development of administrative procedures and policies related to financial management, cost allocation and monitoring.
- Creation of financial reports and documents.
- Providing training to service providers on financial compliance with the Workforce Innovation and Opportunity Act (WIOA), H1B retraining funding or other regulated funds.
- Conducting financial compliance reviews of WIOA service providers.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and provide updates including specifying persons responsible, timeframes, and measurable objectives.

# Minimum Qualifications:

• 3 years verifiable experience in providing similar services as those noted in the application area above.

<u>Supplementary Questions and Requirements</u>: No supplemental information or questions are required.

## 25. Legal Advice for Cannabis Equity Applicants

OEWD is seeking consultants to provide legal advice to small businesses and individuals, regarding the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604).

OEWD seeks providers that demonstrate familiarity with the local, California, and federal laws and regulations and the knowledge, experience, and ability to provide one-on-one consultation, and to develop educational materials to clarify the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604). Providers should be prepared and able to provide legal advice, including updates on current legal and legislative

developments. That advice should cover, but should not necessarily be limited to, the following general categories: license and permitting, banking, compliance audits, zoning, and tax and compliance.

Providers who demonstrate the qualifications and capacities to provide the professional assistance will be placed on a qualified provider list. On an as-needed basis, OEWD will use the list to match technical assistance providers to eligible clients.

# **Minimum Qualifications:**

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience with success providing similar services to small businesses or individuals

# **Preferred Qualifications:**

- Knowledge of San Francisco's neighborhoods and small business infrastructure
- Experience working in a government and/or non-profit setting interacting with the development and implementation of programs that serve disadvantaged clients.
- Experience providing legal advice to inexperienced small business owners seeking to enter heavily-regulated industries

# **Supplementary Questions and Requirements:**

- 1. Please provide a description of your firm's qualifications, including an understanding of laws pertinent to the San Francisco Equity Program, and having an approach, contracts, and experience providing comparable services in the industry or a related industry
- Describe your past and present experience providing legal advice and developing
  education materials in any of the areas listed above. Please identify all areas of
  expertise. Include experience and approach working with historically marginalized
  individuals with a complex range of needs. Specify if this experience is directly tied to
  the cannabis industry.
- Please share two examples of similar projects worked on and completed. Provide the scope, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.
- 4. Provide an example of how you explained a complex situation so that your client or audience who are not familiar with the industry technical terms understood what you were explaining. Provide the background, complex situation/regulation, your approach and actions, clarifying language and tools, and the results.
- Provide a list of staff and significant subcontractors that would work on this project, including their qualifications, relevant experience, roles and responsibilities, and other projects they will be working on during the proposed timeline, along with percentage of time committed;
- 6. Provide a cost estimate and blended rate per hour for each scope of work element; and
- 7. Provide at least two professional references that can verify your firm's past experience and outcomes.

# 26. Small Business Needs Assessment

OEWD is seeking consultants demonstrating successful experience in providing economic consulting services to conduct a small business needs assessment with updated data and conduct a deeper analysis that sheds light on the effectiveness of OEWD's services, investments and

programmatic impact on small businesses; and identifies gaps in services and needed investments for businesses and business districts.

The study will inform our strategy for local and federal funding and intra-agency coordination for small business support services. The questions we would like the study to address are:

- What is OEWD doing to support small businesses?
- What's working/not working?
- Are we serving the small business community needs?
- How should we programmatically implement the recommendations from OEWD's 2017 retail study related to the national changing face of retail and its impacts locally?
- What unique challenges are encounter by women-owned businesses, minority-owned businesses, and low-income business owners, and what can be done to help address these challenges?

The research study will use a mixed-methods approach to evaluate OEWD's small business programs. The method may include an analysis of public and proprietary data, survey, and focus groups. The data analysis should be conducted first and will help shape the survey questions and focus group sessions. Focus groups of diverse stakeholders who have both engaged and not engaged in City-sponsored programs will go deeper and fill in gaps where information is missing from the data and survey.

Activities under this section may include:

- Identification, mapping, and relationship of existing services to support small businesses and entrepreneurs at different stages of small business development from pre-startup to expansion and growth.
- Analysis of quantitative data collected and provided (service provider reporting, OpenSF
  public data, local and state revenue streams, and other sources), and recommendations on
  what we should collect in the future to conduct annual program and service evaluation.
- Stakeholder research/survey and statistical evaluation of the effectiveness of programs to serve small businesses and microenterprises (what do the numbers mean, how significant are they, and what do they imply about the ways the City could operate and improve?).
- Recommendations and opportunities to increase the efficiency, effectiveness, accessibility, and coordination of the programs funded and services provided with a focus on businesses that are owned by, employ, or serve low- to moderate- income persons.
- Inventory of effective tools other entities (i.e. Cities, States, Federal Government, Non-profits, etc.) are using to help address the unique challenges faced by women, minority, and low-wealth small business owners. Of these tools, what is OEWD actively using, and what should be adopted or enhanced?

The study should begin in January 2019. The completion of the study, including recommendations, should be done by August 2019 in time for the Community Development Block Grant (CDBG) Request for Proposals for FY2020-2025, which is anticipated for November 2019.

# **Minimum Qualifications:**

• Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco

- At least three years of experience must have been in conducting similar studies surveying and researching concerning small businesses.
- Experience may include, but is not limited to: research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations.
- Experience in one or more of the following topics:
  - Economic development strategy
    - Analyzed neighborhood and/or regional economic composition and performance, the structure and competitiveness of an industry or industry clusters, or local factor conditions, or
    - Conducted surplus and leakage analysis
    - Developed an economic strategy that included all of the following: sector analysis, analysis of local factor conditions, and research on best practices in areas that may include small business development, local hiring, and procurement policy
    - Performed quantitative or qualitative market research in neighborhoods to inform economic development strategy recommendations;
    - Performed follow-up activities to either (1) implement the recommended programs and strategies resulting from the tasks listed above, including but not limited to the development of marketing strategies
  - Economic research
    - Prepared and implemented survey or interview research designs concerning business and consumer behavior, or
    - Performed econometric analysis of statistical data related to urban policy issues.
- Fiscal analysis
  - Performed professional and technical analysis in analyzing and forming revenue forecasts at local and state levels. The sources of revenue streams may include property taxes, sales taxes, income taxes, bond issuance, or any other types of public financing mechanisms, or
  - Compiled and analyzed employment data at both macro and detailed industry levels and produced employment projections based on trend as well as statistical analysis.
- Small Business Program evaluation
  - Assessed and evaluated business assistance programs
  - Conducted impact evaluation
  - Performed stakeholder research that was used to inform the evaluation of a proposed business project or program.

# **Preferred Qualifications:**

- Experience working with municipalities
- Experience working with similarly scoped study in the Bay Area in the last 5 years
- Staff (subcontractor staff) with diverse language and cultural competency

## **Supplementary Questions and Requirements:**

1. Please share at least two examples of similar projects worked on and completed. Provide the scope, budget, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.

- 2. Describe your knowledge of challenges and opportunities for small businesses in San Francisco.
- 3. Describe research and sources of information to be used to support this project

# 27. Nonprofit Capacity Building

OEWD is seeking nonprofit organizational development consultants to guide organizational diagnostic assessments, provide business counseling and identify capacity-building resources including service providers and/or training services. Specifically, OEWD is seeking consultants with expertise in one or more of the following areas, as they relate to nonprofit capacity building:

- a. Organizational needs assessment & market analysis
- b. Strategy, vision & impact
- c. Leadership coaching
- d. Fund development & resource generation
- e. Board development
- f. Equity, diversity & cultural competence
- g. Staff recruiting, development and retention
- h. Financial planning, budgeting, oversight & operations
- i. Succession planning
- j. Risk assessment
- k. Organizational design & change management
- I. Mergers and strategic restructuring
- m. Evaluation and infrastructure for ongoing program & organizational assessment
- n. Volunteer management
- o. Technological infrastructure
- p. Nonprofit establishment and formation
- q. Industry specific expertise (i.e. economic development, workforce, arts, education...etc.)

# Activities under this section may include:

- Guiding organizational leadership in a diagnostic assessment of organizational capacity
- Developing and implementing individualized capacity-building plans and scopes of work for nonprofit clients
- Directing nonprofit clients to training programs and service providers, assisting with evaluation of proposals
- Providing direct services to clients
- Tracking and reporting on impact of the work being provided

Additional information for this Section: The Business Development Division has a standard cap of \$150 hourly rate for consulting (firms with extensive and/or specialized experience may be paid more). Applicants should demonstrate in their response the following specifics:

## **Minimum Qualifications**:

 3 years verifiable experience providing coaching, business development, capacity building and/or training services to nonprofit clients <u>and</u> a minimum of 10 nonprofit clients directly assisted. <u>Supplementary Questions and Requirements</u>: Please answer the following questions and provide samples of work as part of the response package.

- 1. Explain your ability to guide organizational diagnostic assessments and develop nonprofit capacity building plans.
- 2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
- 3. Describe your knowledge of appropriate nonprofit resources and service providers to which nonprofit boards and senior staff would be directed.
- 4. Indicate the languages you (or key staff) speak and the proficiency with which you speak them:
  - a. Level 1 Elementary proficiency
  - b. Level 2 Limited working proficiency
  - c. Level 3 Professional working proficiency
  - d. Level 4 Full professional proficiency
  - e. Level 5 Native or bilingual proficiency
- 5. Describe your rapport or approach with clients. How do you communicate effectively with nonprofit organizations and engage the cooperation of board members and other key stakeholders in the implementation process?
- 6. Describe your success in helping nonprofit clients accomplish specified goals.
- 7. What knowledge and experience do you possess for dealing with clients' capacity challenges and producing results of a desired level? Please provide specifics related to all subareas a through q for which you would like this application to be considered.
- 8. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
- 9. Are you willing to be compensated at or under the Business Development Division's hourly rate cap of \$150 per hour?
  - a. Yes
  - b. Yes for some but not all contracts (Please answer question below)
  - c. No (Please answer question below)

What is your firm's blended hourly rate?

# PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	ECONOMIC AND	WORKFORCE D	<u>PEVELOPMENT</u>	Dept. Code: <u>ECN</u>						
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 37211 - 16/17)								
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)					
Type of Service: Consulting- Marketing and Branding										
Funding Source: General Funds										
PSC Original	Approved Amour	nt: <u>\$40,000</u>	PSC Original Approved Duration: 05/01/17 - 06/30/18 (1 year 8 weeks)							
PSC Mod#1 Amount: no amount added			PSC Mod#1 Duration: <u>06/15/18-06/30/19 (1 year)</u>							
PSC Cumulat	ive Amount Prop	osed: \$40,000	PSC Cumulative Duration Proposed: 2 years 8 weeks							

# 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The work consists of marketing and branding services to develop a logo, brand identity, branding, website layout, plaques and decals for the Legacy Business Registry.

B. Explain why this service is necessary and the consequence of denial:

Per San Francisco Administrative Code sections 2A.242 and 2A.243, which was established by Proposition J in November 2015, the purpose of the Legacy Business Registry is to recognize that longstanding, community-serving businesses can be valuable cultural assets of the City. The City intends the Registry to be a tool for providing educational and promotional assistance to Legacy Businesses to encourage their continued viability and success. Marketing and branding services are necessary to achieve the goal of providing promotional assistance to Legacy Businesses. If services were denied, the Office of Small Business would not be able to provide promotional assistance to Legacy Businesses as intended per the San Francisco Administrative Code.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  Yes
- D. Will the contract(s) be renewed? Unknown at this time.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

# 2. Reason(s) for the Request

A. Display all that apply

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

# Explain the qualifying circumstances:

This is a one-time, short term project to develop a logo, brand identity, branding, website layout, plaques and decals for the Legacy Business Registry. It requires special expertise in marketing, branding and graphic design. Once the items have been developed, no further services would be required from the contractor.

# B. Reason for the request for modification:

To extend the term on an existing PSC.

# 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Specific skills and expertise include marketing and graphic design, which are required for the designing of logos and symbols, the development of brand and brand identity, the creation of websites, and the development of plaques and decals.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5320, Illustrator and Art Designer; 5330, Graphics Supervisor;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

# 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - This work is of such highly specialized nature and short duration that it is impractical to perform by an existing civil service class.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This project is short term.

# 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - The contractor will train employees on how to properly use the logo and how to do branding for the Legacy Business Program. The estimated amount of staff time on training is 4 hours (2 hours for 2 employees).
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

This request is to extend a current project by approximately 1yr

**7.** <u>Union Notification</u>: On <u>07/11/18</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>37211 - 16/17</u>

DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 07/24/2018

## PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>GENERAL SER</u>	VICES AGENCY	- PUBLIC WORKS	<u>S DPW</u>	Dept. Co	de: <u>DPW</u>				
Type of Request:	☑Initial	☐Modification	of an existing PS	SC (PSC #	)				
Type of Approval:	□Expedited	☑Regular	□Annual	$\Box$ Continuing	☐ (Omit Posting)				
Type of Service: <u>Lead Master Developer- Joint Development</u>									
Funding Source: Interdepart PSC Amount: \$3,500,000	rtmental Fund	PSC Est. Start Da	te: <u>12/01/2020</u>	PSC Est. End Date	e <u>12/01/2026</u>				

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The Potrero Joint Development Project is the modernization and expansion of the SFMTA Potrero Yard bus maintenance division, and the addition of housing above this bus facility, all built within one building. Under this Joint Development project delivery approach, a Lead Master Developer will initially work with the City during a non-binding Pre-Development Agreement (PDA) phase to develop the design for this very unique building structure with vertically integrated combination of uses. Services to be performed by the Lead Master Developer during the PDA phase will include design for the fully integrated building to approximately 40% - 50% design. Other services to be provided by the Lead Master Developer during the PDA phase that will interface with the building design process include cost estimating and scheduling. Once this suite of services is underway, the Lead Master Developer will work with the City to arrive at mutually agreeable technical, financial, legal, real estate and commercial terms that will be further developed into the final terms of a master Project Agreement for the complete delivery of the remaining design, construction and delivery of the project. It should be noted that the project will not pay any monies to the Lead Master Developer for providing these services during the PDA phase. The purpose of submitting this form was to provide early notification to the unions and the Commission. The estimated value of this Professional Services Contract intends to represent one possible value for a termination fee, should there be a need to terminate prior to reaching mutual agreement with the developer on final terms during the PDA phase. At which time, a termination fee paid to the developer would secure the design product for further advancement. Otherwise, no monies will be paid during the PDA phase.

- B. Explain why this service is necessary and the consequence of denial:
- The building design services are necessary to be performed under the Lead Master Developer because the design process must be integrated with and iterated among the other services to be provided by the Lead Master Developer, which include cost estimating, scheduling, real estate, and commercial analysis, financial modeling, legal counsel and life-cycle planning for all components of the project scope. The risks associated with the design and financing must be bundled together under the Lead Master Developer to ensure proper risk allocation and risk control. The consequences of denying this request for entering into a PDA with the Lead Master Developer would be having no opportunity to contract with a developer partner to incorporate housing on this SFMTA Potrero Division site.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  - This type of joint development service has not been provided in the past. This is an innovative way to explore how housing can be added to City-owned public lands and develop new project delivery methods that utilize joint development to simultaneously accomplish City Agency goals for modernizing and expanding major public assets, and also contribute to City housing goals and affordable housing goals by colocating new housing with City-owned and operated facilities and infrastructure.
- D. Will the contract(s) be renewed? No.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.

The PSC duration will not exceed 5 years.

### 2. Reason(s) for the Request

A. Indicate all that apply (be specific and attach any relevant supporting documents):

✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

B. Explain the qualifying circumstances:

These services require extensive knowledge of a highly specialized and complex joint development Project Agreement structure involving the delivery of both a major public asset, private housing and private financing.

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Social Infrastructure project development and financing, jointly developing transit and public infrastructure projects with real estate components.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

No such resources are available within the City.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  City staff do not possess the highly specialized qualifications or experience to deliver these services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, a complicated joint development project of this scope is very specific to the opportunity and wouldn't justify a new civil service class.

### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No. While training will not be provided by the contractor, this project is training and building the knowledge base within the Local 21 Project Manager classifications for how to successfully deliver joint development projects that combine public asset and private housing development. In reference to the above statement, classifications 5502, 5504 and 5506 can all benefit from the process of the delivery of this project.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.

- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. Yes.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- 7. <u>Union Notification</u>: On <u>07/14/2020</u>, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Alexander Burns</u> Phone: <u>415-554-6411</u> Email: <u>alexander.burns@sfdpw.org</u>

Address: 49 South Van Ness, Suit 1600 San Francisco, CA 94103

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42079 - 19/20

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### Williams, Hyun (DPW)

**From:** dhr-psccoordinator@sfgov.org on behalf of alexander.burns@sfdpw.org

**Sent:** Tuesday, July 14, 2020 9:10 AM

To: Burns, Alexander (DPW); Criss@SFMEA.com; Meyers, Julie (HSA); seichenberger@local39.org;

camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com;

sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com;

eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org;

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davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.comnet;

ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org;

xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@SFMEA.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org;

jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261 @gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@SFMEA.com;

ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Williams, Hyun (DPW); DHR-PSCCoordinator,

DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42079 - 19/20

**Follow Up Flag:** Follow up Flag Status: Flagged

RECEIPT for Union Notification for PSC 42079 - 19/20 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 42079 - 19/20 for \$3,500,000 for Initial Request services for the period 12/01/2020 – 12/01/2026. Notification of 30

days (60 days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15219 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# Additional Attachment(s)

### SAN FRANCISCO MUNICIPAL TRANSPORTATION AGENCY BOARD OF DIRECTORS

### RESOLUTION No. 200407-035

WHEREAS, The Potrero Yard Modernization Project (Project) includes the simultaneous development and construction of a modern bus storage and maintenance facility with multi-family housing constructed above the facility; and,

WHEREAS, The San Francisco Municipal Transportation Agency (SFMTA) will deliver the Project under its Building Progress Program and consistent with the citywide Public Land for Housing initiative, which encourages joint development opportunities for housing on public sites; and,

WHEREAS, Based on the Project's public and private features, staff have determined it is appropriate and in the City's best interest to deliver the Project utilizing a joint development procurement method; and,

WHEREAS, The joint development solution provides for a single point-of-responsibility for managing project complexity and contractors (e.g., design-build contractors, maintenance contactors for private housing development), financing, and successfully delivering the Project; and,

WHEREAS, The SFMTA has partnered with the Department of Public Works to deliver the Project and plans to issue a Request for Qualifications and subsequent Request for Proposals to procure the services of a joint development partner.

WHEREAS, The SFMTA requires a project-specific ordinance from the Board of Supervisors because existing authority to utilize the joint development procurement method does not currently exist in the Administrative Code.

WHEREAS, The project-specific ordinance is required before the SFMTA and Department of Public Works issue the RFP for the joint development services in the summer of 2020.

WHEREAS, In November 2019 a project application for the Project was submitted to the San Francisco Planning Department to initiate environmental review of the Project under the California Environmental Quality Act (CEQA); and,

WHEREAS, On March 13, 2020, the SFMTA, under authority delegated by the Planning Department, determined that Project Specific Legislation for Potrero Yard Modernization Project is are not a "project" under the CEQA pursuant to Title 14 of the California Code of Regulations Sections 15060(c) and 15378(b); and,

WHEREAS, A copy of the CEQA determination is on file with the Secretary to the SFMTA Board of Directors; now, therefore, be it

RESOLVED, That the SFMTA Board of Directors authorizes the SFMTA to use a joint development procurement method for the Potrero Yard Modernization Project; and be it further

RESOLVED, That the SFMTA Board of Directors authorizes the Director of Transportation to seek approval from the Board of Supervisors for a Project-specific ordinance to implement the joint development procurement method in a manner that is most efficient for the Project.

I certify that the foregoing resolution was adopted by the San Francisco Municipal Transportation Agency Board of Directors at its meeting of April 7, 2020.

Secretary to the Board of Directors

San Francisco Municipal Transportation Agency

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL T	RANSPORTATIO	ON AGENCY	MTA	Dept. C	ode: <u>MTA</u>
Type of Request:	☑Initial	□Modifica	ition of an exist	ing PSC (PSC#	)
Type of Approval:	□Expedited	☑Regular	□Annual	$\Box$ Continuing	$\square$ (Omit Posting)
Type of Service: Transit planning/analysis, conceptual engineering of transit elements, environment planning.  Funding Source: Federal/Local Funds, Federal/ State Grants PSC Duration: 5 years 1 day					
PSC Amount: \$6,000,000					
Description of Work     A. Scope of Work/Service     The contractor will perfo					
•Identify transit alignments for specified transit corridors					
<ul> <li>Advance the most pronengineering and architects</li> <li>safety, and project sched</li> </ul>	tural discipline	•		• .	• .
•Estimate alignment cos	ts and benefits				
•Recommend an implem	entation strate	egy.			
B. Explain why this service San Francisco Municipal required to complete thit occur very infrequently (	Transportation s work. Plannir	Agency (SFI	MTA) staff do no ptual design foi	ot have all the spe r major transit cap	oital projects tend to

- San Francisco Municipal Transportation Agency (SFMTA) staff do not have all the specialized expertise required to complete this work. Planning and conceptual design for major transit capital projects tend to occur very infrequently (e.g. one or occasionally two or three of these types of projects over several decades in major cities). The contractor we seek will regularly work on similar projects in other cities and have substantial experience with emerging best practices in transit system engineering design, including tunnel and underground station design, which are expertise areas the City does not have. The projects relying on this procurement, which are needed to prepare for San Francisco's future transportation needs, will be unable to proceed without this procurement.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  - We are not aware of similar work being conducted by the City. Planning phases for other subway projects were contracted by the San Francisco County Transportation Authority (which is a separate governmental entity not subject to Civil Service Commission approvals)
- D. Will the contract(s) be renewed?

The contract would have options to extend for two additional one-year periods. While some of the projects that would utilize this contract are known, others are expected to take additional time to identify and procure funding for. Therefore, the potential to extend for two additional one-year terms would provide flexibility to complete project work for projects that may not commence until the second or third year of the contract.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.

Typically completing work for a project that would utilize this contract takes 2-3 years. Some projects anticipated to use this contract would not be ready to commence work until a few years into the contract.

### 2. Reason(s) for the Request

- A. Indicate all that apply (be specific and attach any relevant supporting documents):
- ✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- ✓ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

### B. Explain the qualifying circumstances:

All projects anticipated to use this procurement involve capital planning. In order to develop transit corridor alternatives, specific expertise is needed from a contractor to perform planning and engineering technical analysis. The anticipated work is done infrequently — while city staff has some skill in these areas, they are not equipped to provide all the relevant expertise needed. Internal staff will supervise the consultant team.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: •Transit concept alternatives development •Conceptual engineering of tunnels, stations, and other elements of rail transit systems to preliminary 5-10 % level of design •Engineering technical analysis such as capital cost estimating, project scheduling, analyzing construction methods and impacts, and familiarity with life safety requirements for tunnels and stations •Planning technical analysis including developing and applying evaluation criteria, ridership forecasting, demographic analysis, analyzing transportation performance, and developing transit operating plans •Environmental analysis •Engineering support of outreach such as producing visual materials that illustrate conceptual engineering and provide technically knowledgeable staff to participate in City-led outreach meetings
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5241, Engineer; 5283, Planner 5; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV; 5502, Project Manager 1; 5504, Project Manager 2;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

City staff in the classifications listed above will be involved in this planning effort but several specialty expertise areas as described above are not available within the City.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - Some similar planning and engineering work are performed by existing civil service classes (including 5288, 5289, 5290, 5283, 5207, 5241, 5502, 5504); however, the projects relying on this procurement require specialized engineering skills and expertise as described above which city staff do not possess in the needed level of detail. However, staff from these classifications would be utilized to supervise and direct the consulting work.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No this type of work arises too infrequently and expertise is best provided by personal services contractors that support multiple cities working on similar types of transit projects.

### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. This contract is intended to augment staff expertise for infrequent short-term planning needs. These are extremely infrequent projects that do not occur often enough to justify staff training.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- 7. <u>Union Notification</u>: On <u>07/06/2020</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Amy NUQUE</u> Phone: <u>415-646-2802</u> Email: <u>amy.nuque@sfmta.com</u>

Address: 1 S Van Ness Ave HR ELR, 6th Fl, 6029

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40423 - 19/20

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### Nuque, Amy

From: dhr-psccoordinator@sfgov.org on behalf of amy.nuque@sfmta.com

**Sent:** Monday, July 6, 2020 3:29 PM

To: Nuque, Amy; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org;

kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; DHR-

PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 40423 - 19/20

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

RECEIPT for Union Notification for PSC 40423 - 19/20 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 40423 - 19/20 for \$6,000,000 for Initial Request services for the period 02/01/2021 – 02/01/2026. Notification of 30

days (60 days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15113 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

### Nuque, Amy

From: Timothy Mathews <tmathews@ifpte21.org>
Sent: Wednesday, August 26, 2020 11:17 AM

**To:** Brisson, Liz; Nuque, Amy **Subject:** FW: Meet and Confer Follow Up

### **EXT**

Amy and Liz,

At this time, the Union can withdraw our objection for PSC # 40423.

Given our discussion and the below mutual agreement around principles, we are confident we can come to a formal agreement around them.

For the Union,

Timothy

---

### Timothy Mathews

Pronouns: He/him/his Research Specialist

#### **IFPTE Local 21**

1167 Mission Street, 2<sup>nd</sup> Floor San Francisco, CA 94103

Office: 415-914-7345

From: Brisson, Liz < <u>Liz.Brisson@sfmta.com</u>>
Sent: Tuesday, August 25, 2020 7:34 PM

**To:** Timothy Mathews < <a href="mathews@ifpte21.org">tmathews@ifpte21.org</a>>

Subject: RE: Meet and Confer Follow Up

Great, thanks Timothy! I will give the document a closer read tomorrow but upon quick skim it looks about right—do we need to have it done before you withdraw the objection? Or can we proceed with the written outline agreement below and commit to finalizing this agreement quickly thereafter?

#### **Liz Brisson**

Major Corridors Planning Manager Sustainable Streets Division



Office 415.646.2358

San Francisco Municipal Transportation Agency 1 South Van Ness Avenue, 7th floor San Francisco, CA 94103



From: Timothy Mathews < tmathews@ifpte21.org>

**Sent:** Tuesday, August 25, 2020 4:55 PM **To:** Brisson, Liz < <u>Liz.Brisson@sfmta.com</u>> **Subject:** RE: Meet and Confer Follow Up

#### **EXT**

Hi Liz,

Thank you for this. Yes, below captures our mutual understanding, coming out of our call.

I just received word that we can agree to the below three points, and move forward together.

I also took a few minutes today, to begin a draft of what an agreement might look like. Missing a few points, but I think getting there.

Thank you.

-Timothy

---

**Timothy Mathews**Pronouns: He/him/his
Research Specialist

**IFPTE Local 21** 

1167 Mission Street, 2<sup>nd</sup> Floor San Francisco, CA 94103

Office: 415-914-7345

From: Brisson, Liz < <u>Liz.Brisson@sfmta.com</u>> Sent: Tuesday, August 25, 2020 3:00 PM

**To:** Timothy Mathews < <a href="mathews@ifpte21.org">tmathews@ifpte21.org</a>>

Subject: Meet and Confer Follow Up

Hi Timothy,

Thanks again for the productive discussion yesterday. I checked in with a couple others who agree that the commitments we discussed were acceptable. I took a stab at documenting below. Let me know how it looks.

- For individual Task Orders using the PSC, SFMTA will share Draft Task Order scope with Local 21 to have right of first refusal for any scope items where City staff have the right expertise to provide. Local 21 should respond no later than 60 days from the time of sharing the draft scope, but should strive to do so faster.
- SFMTA staff will work with Local 21 to host a brownbag session with staff who were involved in the PSC work to share more about the work completed via the PSC

For both of the above SFMTA and Local 21 will work collaboratively to finalize a more detailed agreement to
cover details such as the mechanics of the right of first refusal notification process prior to SFMTA executing the
contract.

### **Thanks! Liz**

### **Liz Brisson**

Major Corridors Planning Manager Sustainable Streets Division



Office 415.646.2358

San Francisco Municipal Transportation Agency 1 South Van Ness Avenue, 7th floor San Francisco, CA 94103



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This message is from outside of the SFMTA email system. Please review the email carefully before responding, clicking links, or opening attachments.

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION PUC				Dept. Code: PUC		
Type of Request:	☑Initial	□Modifica	ition of an exis	ting PSC (PSC#	)	
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Service: <u>State Leg</u>	islation Represe	ntation and	Advocacy Serv	ices (PRO.0178)		
Funding Source: SFPUC Ex	ternal Affairs O <sub>l</sub>	perating Bud	get PSC	Duration: <u>5 years</u>	<u>S</u>	
PSC Amount: \$1,680,000						
A. Scope of Work/Service Contractor shall develop Public Utilities Commiss power, infrastructure at legislative and regulator materials; and represent regulatory agencies, incomeeded political and poor B. Explain why this servit A lobbyist is best positical legislature in areas of intimpacts to its water, was actions. SFPUC is also as infrastructure.	o and implemention (SFPUC) on load other issues any items of interting the SFPUC lostry association licy communications are is necessary and to perform terest to SFPUC istewater and position of the stewater and position in the stewater and position is to see the stewater and position is the stewater and p	t a compreh legislative ar as directed. Sest; drafting before the Cons and other tions subcon and the cons legislative rower enterpower enterpose.	nd regulatory is Scope includes legislative lang alifornia State rentities as new tractors releval equence of de epresentation ese services, the rises resulting to	identifying and acguage, comment leguage, comment leguage, comment leguaged. This contract to legislative armial:  and advocacy service SFPUC is at risk from legislative and legislative and legislative and legislative and legislative and legislative and identifications.	ater, wastewater, lyocating for or against etters and other overnor's office, t also allows for as- nd regulatory activities. vices before the state of costly operational d administrative	
C. Has this service been attach copy of the n SFPUC has contracted pursuant to PSC 469  D. Will the contract(s) by Yes.	nost recently ap ed for these serv 146-16/17.	proved PSC.			d under a previous PSC, C Contract PRO.0060	
E. If this is a request for PSC by another five This PSC is five years legislature, administ	years, please ex s exactly, to allo	plain why. w for contin	uity in the SFPI			
A. Indicate all that apply		d attach any	relevant suppo	orting documents)	:	
☑ Services required on a	an as-needed, in	termittent,	or periodic bas	is (e.g., peaks in w	orkload).	
✓ Services that require operator).	resources that t	he City lacks	(e.g., office sp	ace, facilities or ed	quipment with an	

### B. Explain the qualifying circumstances:

The service is required intermittently; most lobbyists represent multiple clients and thus the position could not be fulfilled by a fulltime City employee. Additionally, the City does not currently have this capacity, nor do we have employees or resources based in Sacramento.

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Seven (7) years of lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the California State Legislature, the Governor's Office and appropriate government agencies.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 0923, Manager II; 0933, Manager V;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, an office in Sacramento, CA.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

N/A

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

The level of legislative representation needed in Sacramento, CA for this work do not currently exist within the City. These services would require dedicated staff to be based in the state capitol in order to attend meetings with state public officials and administrators, and testify at hearings on behalf of the Department. Civil service staff in house will be working closely with this contractor, i.e. in analyzing, tracking, and providing strategy around legislation.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Civil Service classes may be relevant to portions of the work, but there is no one particular class or group of classes that encompasses the specific qualifications and expertise required for these services, and the work must be performed in Sacramento, CA on a daily basis.

### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. Training will not be provided.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.

- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>07/27/2020</u>, the Department notified the following employee organizations of this PSC/RFP request:

<u>Architect & Engineers, Local 21; Municipal Executive Association; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Daniel Kwon</u> Phone: <u>415-934-5722</u> Email: <u>dkwon@sfwater.org</u>

Address: 525 Golden Gate Avenue 8th Floor San Francisco, CA 94102

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41046 - 19/20

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>dkwon@sfwater.org</u>

To: Kwon, Daniel; amakayan@ifpte21.org; Criss@SFMEA.com; Camaguey@SFMEA.com; Christina@SFMEA.com;

staff@SFMEA.com; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com;

tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org;

L21PSCReview@ifpte21.org; Irwin, William; DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 41046 - 19/20

**Date:** Thursday, July 23, 2020 3:54:41 PM

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This message is from outside the City email system. Do not open links or attachments from untrusted sources.

RECEIPT for Union Notification for PSC 41046 - 19/20 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 41046 - 19/20 for \$1,680,000 for Initial Request services for the period 03/01/2021 - 02/28/2026. Notification of 30 days (60

days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15206 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# Additional Attachment(s)

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION				Dept. (	Code: <u>PUC</u>
Type of Request:	□Initial	☑Modification	of an existing PS	SC (PSC # 46946 - 16	/17)
Type of Approval:	☐ Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)
Type of Service: State Legislative Representation and Advocacy Services (CS-1065)					
Funding Source: SFPUC External Affairs Budget					
PSC Original Approved Amount: \$1,200,000			PSC Original Approved Duration: <u>05/01/17 - 04/29/22 (4 years 52 weeks)</u>		
PSC Mod#1 Amount: \$100,000			PSC Mod#1 Duration: no duration added		
PSC Mod#2 Amount: <u>\$400,000</u>			PSC Mod#2 Duration: no duration added		
PSC Cumulative Amount Proposed: \$1,700,000			PSC Cumulative Duration Proposed: 4 years 52 weeks		

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The proposed work consists of developing and implementing a comprehensive state lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure, and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters, and other materials; and representing the SFPUC before the California State Legislature, the Governor's office, regulatory agencies, industry associations and other entities as needed. This work will be performed in our state's capitol, Sacramento, CA, on a daily basis.

- B. Explain why this service is necessary and the consequence of denial:
- These services are necessary because a lobbyist is best positioned to perform legislative representation and advocacy services before the state legislature in areas of interest to SFPUC. Without these services, the SFPUC is at risk of costly operational impacts to its water, wastewater and power enterprises resulting from legislative and administrative actions. The SFPUC is also at risk of losing out on critical funding opportunities to support its operations and infrastructure.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 46946 16/17
- D. Will the contract(s) be renewed? No.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

### 2. Reason(s) for the Request

A. Display all that apply

✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

### Explain the qualifying circumstances:

Depth of knowledge and experience in lobbying, specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the California State Legislature, the Governor's Office and appropriate government agencies.

### B. Reason for the request for modification:

State Legislative Representation and Advocacy Services are critical to the passage of new statutes that directly benefit the SFPUC and to eliminating or minimizing negative impacts of problematic legislation. Due to an increase in regulatory, legislative and policy developments impacting the SFPUC, it is necessary to increase the not-to-exceed amount to allow for the contractor to increasingly engage a subcontractor, to adequately represent the SFPUC.

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: The required skills includes strong lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the California State Legislature, the Governor's Office, and appropriate government agencies.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 0923, Manager II; 0933, Manager V;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, an office in Sacramento, CA near our state capitol.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - Civil service classes may be relevant to portions of the work, but there is no one particular class or group of classes that encompasses the specific qualifications and expertise required for these lobbying and advocacy services, and the work must be performed in Sacramento, CA on a daily basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, adopting a new civil service class would not address the advantages of hiring a specialist who has the resources and level of day-to-day contact with state legislative and administrative staff required to effectively advocate on behalf of the Department.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

None.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>07/11/19</u>, the Department notified the following employee organizations of this PSC/RFP request:

<u>Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association;</u> <u>Management & Superv Local 21; Architect & Engineers, Local 21;</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

Address: 525 Golden Gate Avenue, 8th Floor, San Francisco, CA 94102

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>46946 - 16/17</u>
DHR Analysis/Recommendation:
Commission Approval Not Required
Approved by DHR on 07/24/2019

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	PUBLIC UTIL	ITIES COMMIS	SION PUC		Dept. C	ode: <u>PUC</u>
Type of Requ	iest:	☑Initial	□Modifica	tion of an exis	ting PSC (PSC #	)
Type of Appro	oval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)
Laboratory(70	<u>034)</u>	ance & repair onterprise Opera			ipment at SFPUC I	
PSC Amount:	\$193,000					
To provide North Ame Millbrae D	f Work/Servion preventative prica-manufa rinking Wate	ctured Ion chro	and unlimite omatography ervice includ	systems own les one annual	ed and operated b	three Thermo Electron y the SFPUC at the ntenance, unlimited
The service regulatory maintenan	e is necessary compliance ace or repair	requirement. S	asons. Regul FPUC staff d using using S	ar preventative o not possess t SFPUC staff to p	e maintenance and the technical expe perform these serv	d repair coverage is a rtise to perform major vices would invalidate
PSC, at Yes, fo late 20	tach copy of rat least the	the most receipast ten years contract was i	ntly approve . SFPUC-WQ	d PSC. D only became	aware of CSC app	ed under a previous roval requirements in e existing contract
D. Will the No.	contract(s) b	e renewed?				
existing	•	a new PSC in e			ur request is to ex	tend (modify) an
<b>2.</b> <u>Reason(s)</u> A. Indicate	-		nd attach ar	ıy relevant sup	porting document	s):
☑ Short-te	rm or capital	projects requi	ring diverse	skills, expertise	e and/or knowledg	e.
•		circumstances ely short-term a		specific trainir	ng provided by the	manufacturer of this

equipment.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Skills require specialized training on Ion Chromatography systems provided by/ and authorized by Thermo Electron North America. As the manufacturer of the equipment, Thermo Electron North America has access to proprietary knowledge related to operations and repair, as well as access to replacement parts
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available</u> resources within the City?

To date, the department has not made extensive efforts to identify resources employed by the City because the training required is so specialized, and even if they were to identify an appropriate class, access to parts and legal/warranty issues would arise.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  There are no Civil Service classifications that recieve specialized training from Thermo Scientific North America on the operations and maintenance of Ion Chromatography systems.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The nature of the work is extremely limited and the SFPUC's commitment to using Ion Chromatography systems manufactured by Thermo Electron may not be long-term.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No. Training will not be provided.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.

7. <u>Union Notification</u>: On <u>08/14/2020</u>, the Department notified the following employee organizations of this PSC/RFP request: <u>all unions were notified</u>

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

Address: 525 Golden Gate Avenue 8th Floor San Francisco, CA 94102

\*

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>48083 - 20/21</u>

DHR Analysis/Recommendation: Commission Approval Required

DHR Approved for 09/21/2020

Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>wirwin@sfwater.org</u>

To: <a href="Irwin">Irwin</a>, William; mlobre@sfpoa.org; tony@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org;

rooferslocal40@gmail.com; sal@local16.org; Criss@SFMEA.com; Meyers, Julie (HSA);

seichenberger@local39.org; Camaguey@SFMEA.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org;

kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org;

tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Kathy;

Sandeep.lal@seiu1021.me; pcamarillo seiu@sbcglobal.net; MRainsford@local39.org;

Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.comnet; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@SFMEA.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcqlobal.net; speedy4864@aol.com; Christina@SFMEA.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Irwin, William; DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Notice for new PCS over \$100K PSC # 48083 - 20/21

**Date:** Friday, August 14, 2020 9:59:08 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

RECEIPT for Union Notification for PSC 48083 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 48083 - 20/21 for \$193,000 for Initial Request services for the period 07/01/2017 – 06/30/2021. Notification of 30 days (60 days for SEIU) is required.

After logging into the system please select link below, view the information and verify receipt:

http://apps.sfgov.org/dhrdrupal/node/15393 For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# Modification Personal Services Contracts

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	GENERAL SERVICES AGENCY - CITY ADMIN	Dept. Code: <u>ADM</u>

Type of ☐ Initial ☐ Modification of an existing PSC (PSC # 31841 - 18/19)

Request:

Type of  $\square$  Expedited  $\square$  Regular  $\square$  Annual  $\square$  Continuing  $\square$  (Omit

Approval: Posting)

Type of Service: stakeholder outreach and program evaluation

Funding Source: General fund

PSC Original Approved Amount: \$80,000 PSC Original Approved Duration: 03/15/19 -

03/14/20 (1 year)

PSC Mod#1 Amount: \$12,000 PSC Mod#1 Duration: 03/15/19-05/15/21 (1 year 8

weeks)

PSC Mod#2 Amount: \$75,000 PSC Mod#2 Duration: 03/15/19-07/01/21 (6 weeks 5

<u>days)</u>

PSC Cumulative Amount Proposed: \$167,000 PSC Cumulative Duration Proposed: 2 years 15 weeks

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The Digital Services Division promotes the development of new digital services to help meet the needs of all who use City and County of San Francisco (CCSF) on line services. Digital Services relies on user research as a fundamental means of understanding each customer's story and needs, which informs the design of accessible and intuitive on line services.

Vendor will create and coordinate a User Testing Program to help CCSF departments bring public input into the design of City services. Vendor will recruit, engage and compensate residents for user testing.

Target users will include residents who are low income, English as Second Language speakers, seniors, and people with disabilities. Through this program, Digital Services will conduct user testing by testing its web products on members of these groups and use research results to make its products more accessible by members of these groups. Vendor will assess the program at regular intervals.

B. Explain why this service is necessary and the consequence of denial:
Without having access to regular feedback from these groups, Digital Services cannot tailor its web products to be accessible to all San Franciscans

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.By contract
- D. Will the contract(s) be renewed? Unknown.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

### 2. Reason(s) for the Request

- A. Display all that apply
- ✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Explain the qualifying circumstances:

This is a short term project with specific expertise/knowledge required.

B. Reason for the request for modification:

To add funds

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Knowledge of individuals and organizations to recruit for stakeholder outreach and engagement. Ability to develop and manage relationships with individuals and organizations who will provide input. Experience in program management and evaluation of stakeholder outreach and engagement methods.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer; 1823, Senior Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

No civil service classifications have the range of knowledge, skills and abilities required to perform these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Services are as needed and sporadic.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training will be provided

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

More work is needed by the contractor

**7.** <u>Union Notification</u>: On <u>07/24/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place, Room 362, San Francisco, CA 94102

\*

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>31841 - 18/19</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020

Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### Choi, Suzanne (HRD)

**From:** dhr-psccoordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org

**Sent:** Friday, July 24, 2020 10:58 AM

To: Lubamersky, Joan (ADM); ecassidy@ifpte21.com; WendyWong26@yahoo.com;

wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org;

kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Modification Request to PSC # 31841 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a modification request for a Personal Services Contract (PSC) for \$75,000 for services for the period March 15, 2019 – July 1, 2021. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/14766

Email sent to the following addresses: L21PSCReview@ifpte21.org pkim@ifpte21.org eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ecassidy@ifpte21.com

# Additional Attachment(s)

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN			Dept. Code: <u>ADM</u>			
Тур	e of Request:	□Initial	☑Modification of	an existing PS(	C (PSC # 31841 - 18	/19)
Туре	e of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)
Туре	e of Service: <u>stak</u>	keholder outreach a	<u>nd program evaluati</u>	<u>on</u>		
Fund	ding Source: <u>Ger</u>	neral fund				
PSC	Original Approve	ed Amount: <u>\$80,00</u>	<u>0</u>	PSC Original <u>year)</u>	Approved Duration	n: <u>03/15/19 - 03/14/20 (1</u>
PSC	Mod#1 Amount:	: <u>\$12,000</u>		PSC Mod#1 I	Duration: <u>03/15/1</u>	9-05/15/21 (1 year 8 weeks)
PSC	Cumulative Amo	ount Proposed: <u>\$92</u>	<u>,000</u>	PSC Cumulat	ive Duration Propo	osed: <u>2 years 8 weeks</u>
A. Ti ai	he Digital Service nd County of Sar	Services to be Cont es Division promote n Francisco (CCSF) o	s the development on line services. Digita	al Services relie	es on user research	et the needs of all who use City a as a fundamental means of ad intuitive on line services.
			Jser Testing Program age and compensate			public input into the design of
d tł	isabilities. Throu nese groups and	gh this program, Di	gital Services will cor s to make its product	nduct user test	ing by testing its w	ers, seniors, and people with eb products on members of f these groups. Vendor will
W a	Vithout having accessible to all Sa Has this service	ccess to regular feed an Franciscans been provided in th	ne past? If so, how?	oups, Digital Se		r its web products to be er a previous PSC, attach copy of
	the most rece By contract	ntly approved PSC.				
	Will the contrac	et(s) be renewed?				
E.		st for a new PSC in ears, please explain		or if your requ	est is to extend (m	odify) an existing PSC by
	eason(s) for the Display all that					
$\square$	Short-term or ca	apital projects requ	iring diverse skills, ex	pertise and/o	knowledge.	
Ex		ing circumstances: term project with s	pecific expertise/kno	owledge requir	ed.	
В.	Reason for the r	equest for modifica and duration	tion:			

### 3. <u>Description of Required Skills/Expertise</u>

A. Specify required skills and/or expertise: Knowledge of individuals and organizations to recruit for stakeholder outreach and engagement. Ability to develop and manage relationships with individuals and organizations who will provide

input. Experience in program management and evaluation of stakeholder outreach and engagement methods.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer; 1823, Senior Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

## 4. If applicable, what efforts has the department made to obtain these services through available resources within the City?

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - No civil service classifications have the range of knowledge, skills and abilities required to perform these services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Services are as needed and sporadic.

### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No training will be provided.
- C. Are there legal mandates requiring the use of contractual services? No.
- Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
  No.
- 7. <u>Union Notification</u>: On <u>04/09/20</u>, the Department notified the following employee organizations of this PSC/RFP request: <u>Architect & Engineers, Local 21</u>;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Joan Lubamersky</u> Phone: <u>4155544859</u> Email: <u>joan.lubamersky@sfgov.org</u>

Address: One Carlton B. Goodlett Place, Room 362, San Francisco, CA 94102

\*

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31841 - 18/19
DHR Analysis/Recommendation:
Commission Approval Not Required
Approved by DHR on 04/27/2020

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	AIRPORT COMM	<u>ISSION</u>		Dept. (	Code: <u>AIR</u>	
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 41793 - 18/19)				
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Servi	ce: <u>Airfield Electr</u>	ical Lighting Sys	tem Support Service	<u>es</u>		
Funding Sour	Funding Source: <u>Airport Operating Funds</u>					
PSC Original	Approved Amoun	t: \$400,000	PSC Original Approved Duration: 06/01/19 - 05/31/23 (4 years)			
PSC Mod#1 A	Amount: <u>\$200,000</u>	<u>)</u>	PSC Mod#1 Duration: <u>05/31/23-05/30/25 (2 years)</u>			
PSC Mod#2 A	Amount: <u>no amou</u>	nt added	PSC Mod#2 Duration: <u>05/31/25-06/30/26 (1 year 4 weeks)</u>			

PSC Cumulative Amount Proposed: \$600,000 PSC Cumulative Duration Proposed: 7 years 4 weeks

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

Provide technical support for the proprietary Airfield Lighting Control Monitoring System (ALCM) to ensure SFO Airfield lighting system meets operational airfield lighting compliance and Federal Aviation Administration (FAA) requirements. To maintain FAA compliance, this contract will require unlimited technical phone support during normal business hours, remote access to troubleshoot the proprietary ALCMS system through the internet connection, two on-site site visits per year to do ALCMS preventive maintenance which include system diagnostic and inspection to verify and optimize lighting system performance as well as optimization of hard drives and system calibration.

- B. Explain why this service is necessary and the consequence of denial:
- This service is necessary in order for SFO to maintain FAA compliance and certification for the current proprietary ALCMS as well as to ensure the safety of aircraft and associated personnel that use the airfield lighting system. Denial of this services would compromise the safety of the Airfield and the Airport's FAA compliance.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Yes, this PSC 41793-18/19
- D. Will the contract(s) be renewed?

Yes, if there continues to be a need for such services at SFO.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

Airport has determined that a longer contract is needed to maintain its Airfield Lighting Control Monitoring System. This extension will align with the term of the contract.

### 2. Reason(s) for the Request

- A. Display all that apply
- ✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The City does not possess the required skills and expertise for this service due to lack of access to the proprietary system.

B. Reason for the request for modification:

Modification to increase duration to align with the final contract term

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Services require access to proprietary system, ability to calibrate, trouble shoot and acquire specific software upgrade training unique to the proprietary ALCMS system.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 9240, Airport Electrician;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  Civil Services classes are not applicable because they do not have access to the proprietary system.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No it would not be practical due to the proprietary nature of the system.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training will be provided

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  Not known at this time
- **7.** <u>Union Notification</u>: On <u>07/27/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Electrical Workers, Local 6;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: P.O. Box 8097, San Francisco, CA 94128

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41793 - 18/19
DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 09/21/2020

Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### Ricardo Valle (AIR)

**From:** dhr-psccoordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com

**Sent:** Monday, July 27, 2020 5:45 PM

**To:** Cynthia Avakian (AIR); WendyWong26@yahoo.com; wendywong26@yahoo.com;

tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; oashworth@ibew6.org; khughes@ibew6.org; Ricardo Valle (AIR); DHR-PSCCoordinator, DHR (HRD)

Subject: Receipt of Modification Request to PSC # 41793 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The AIRPORT COMMISSION -- AIR has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period May 31, 2025

– June 30, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

https://gcc01.safelinks.protection.outlook.com/?url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F14459& amp;data=02%7C01%7Cricardo.e.valle%40flysfo.com%7Ce7bd3d2cc36d4748a6b608d83291d6b4%7C22d5c2cfce3e443d9a7fdfcc0231f73f%7C0%7C0%7C637314949241465126&sdata=IMqp1K69K8lwSwe5M0xuAd5zBx5L7PnERmwLU3J5R2U%3D&reserved=0

Email sent to the following addresses: khughes@ibew6.org oashworth@ibew6.org L21PSCReview@ifpte21.org pkim@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com

# Additional Attachment(s)

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	AIRPORT COMM	<u>ISSION</u>		Dept. C	Code: <u>AIR</u>	
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 41793 - 18/19)				
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	$\square$ Continuing	☐ (Omit Posting)	
Type of Servio	ce: <u>Airfield Electr</u>	ical Lighting Syst	em Support Service	<u>es</u>		
Funding Sour	Funding Source: Airport Operating Funds					
PSC Original Approved Amount: \$400,000 PSC Original Approved Duration: 06/01/19 - 05/31/23 (4 years)					<u> 5/01/19 -</u>	
PSC Mod#1 Amount: \$200,000 PSC Mod#1 Dura				ion: <u>05/31/23-05</u>	/30/25 (2 years)	
PSC Cumulati	ve Amount Propo	sed: <u>\$600,000</u>	PSC Cumulative D	uration Proposed	: <u>6 years</u>	

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

Provide technical support for the proprietary Airfield Lighting Control Monitoring System (ALCM) to ensure SFO Airfield lighting system meets operational airfield lighting compliance and Federal Aviation Administration (FAA) requirements. To maintain FAA compliance, this contract will require unlimited technical phone support during normal business hours, remote access to troubleshoot the proprietary ALCMS system through the internet connection, two on-site site visits per year to do ALCMS preventive maintenance which include system diagnostic and inspection to verify and optimize lighting system performance as well as optimization of hard drives and system calibration.

- B. Explain why this service is necessary and the consequence of denial:

  This service is necessary in order for SFO to maintain FAA compliance and certification for the current proprietary ALCMS as well as to ensure the safety of aircraft and associated personnel that use the airfield lighting system. Denial of this services would compromise the safety of the Airfield and the Airport's FAA compliance.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Yes, this PSC 41793-18/19
- D. Will the contract(s) be renewed?

Yes, if there continues to be a need for such services at SFO.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

Airport has determined that a longer contract is needed to maintain its Airfield Lighting Control Monitoring System.

### 2. Reason(s) for the Request

- A. Display all that apply
- ☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The City does not possess the required skills and expertise for this service due to lack of access to the proprietary system.

B. Reason for the request for modification:

Modification to increase PSC amount and duration.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Services require access to proprietary system, ability to calibrate, trouble shoot and acquire specific software upgrade training unique to the proprietary ALCMS system.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 9240, Airport Electrician;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable. Civil Services classes are not applicable because they do not have access to the proprietary system.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No it would not be practical due to the proprietary nature of the system.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training of the proprietary system is requested.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.No.
- **7.** <u>Union Notification</u>: On <u>01/23/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Electrical Workers, Local 6;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: P.O. Box 8097, San Francisco, CA 94128

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41793 - 18/19

DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 02/10/2020

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>AIRPORT COMMISSION AIR</u>				Dept. Code: <u>AIR</u>		
-	Type of Request:	☑Initial	☐Modification	of an existing PS	SC (PSC #	)
1	Type of Approval:	$\square$ Expedited	☑Regular	□Annual	$\Box$ Continuing	☐ (Omit Posting)
7	Type of Service: Airfield E	Electrical Lightin	ng System Suppo	ort Services		
	Funding Source: <u>Airport (</u> PSC Amount: <u>\$400,000</u>	Operating Fund		te: <u>06/01/2019</u>	PSC Est. End Dat	e <u>05/31/2023</u>
1.	Description of Work  A. Scope of Work/Service Provide technical supposes (FAA) requirements. To during normal business internet connection, two system diagnostic and hard drives and system	ort for the proportion meets open meets open maintain FAA shours, remote vo on-site site vinspection to ve	orietary Airfield Lerational airfield compliance, this access to troub visits per year to	lighting complia contract will rec leshoot the prop do ALCMS preve	nce and Federal A quire unlimited teo prietary ALCMS sys entive maintenanc	viation Administration chnical phone support tem through the e which include
	B. Explain why this serv This service is necessar proprietary ALCMS as v lighting system. Denial compliance.	y in order for S well as to ensur	FO to maintain Fe the safety of a	AA compliance a ircraft and assoc	and certification for iated personnel the	nat use the airfield
	C. Has this service been attach copy of the I	most recently a	pproved PSC.			der a previous PSC,
	D. Will the contract(s) by Yes, if there continues		r such services a	t SFO.		
	E. If this is a request for PSC by another five not applicable		•	ers, or if your req	uest is to extend (	modify) an existing
2.	Reason(s) for the Requ A. Indicate all that app		nd attach any re	elevant supportin	ng documents):	
	☑ Short-term or capital	projects requi	ring diverse skills	s, expertise and/	or knowledge.	
	✓ Services that require operator).	resources that	the City lacks (e	.g., office space,	facilities or equip	ment with an

B. Explain the qualifying circumstances:

The City does not possess the required skills and expertise for this service due to lack of access to the proprietary system.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Services require access to proprietary system, ability to calibrate, trouble shoot and acquire specific software upgrade training unique to the proprietary ALCMS system.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 9240, Airport Electrician;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

None, because this is a proprietary system.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  Civil Services classes are not applicable because they do not have access to the proprietary system.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No it would not be practical due to the proprietary nature of the system.

### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No. No training of the proprietary system is requested.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>04/08/2019</u>, the Department notified the following employee organizations of this PSC/RFP request:

Electrical Workers, Local 6; Professional & Tech Engrs, Local 21

 $\square$  I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: P.O. Box 8097 San Francisco, CA 94128

\*

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41793 - 18/19

DHR Analysis/Recommendation:

**Commission Approval Required** 

06/03/2019 DHR Approved for 06/03/2019

action date: 06/03/2019

Approved by Civil Service Commission

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>ECONOMIC AND WORKFORCE DEVELOPMENT</u> Dept. Code: <u>ECN</u>							
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 42645 - 18/19)					
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)		
Type of Servi	ce: <u>Consulting - H</u>	lealthy Retail SF					
Funding Source: General Fund							
PSC Original	Approved Amoun	t: <u>\$240,000</u>	PSC Original Approved Duration: 02/18/19 - 06/30/21 (2 years 18 weeks)				
PSC Mod#1 A	Amount: <u>\$270,000</u>	<u>0</u>	PSC Mod#1 Duration: <u>10/01/20-06/30/22 (1 year)</u>				

PSC Cumulative Amount Proposed: \$510,000 PSC Cumulative Duration Proposed: 3 years 18 weeks

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

Contractor will assist with the implementation of Healthy Retail SF, a City ordinance-mandated technical assistance program designed to increase access to healthy, affordable food. Contractor will be the lead consultant, supporting small businesses with space design, produce consulting, equipment needs, physical improvements and related activities. Contractor will also assist with client identification, conduct assessments of businesses, help create an individual development plan (IDP), provide individualized technical support to business clients based on the IDP, help with tracking progress, and follow up with the client and modify the approach to best suit the client's needs. Contractor will provide direct and focused technical assistance, in individual and group settings if needed. Contractor will also provide equipment, materials, and supplies as outlined in the IDPs to the small businesses.

- B. Explain why this service is necessary and the consequence of denial:
- The Healthy Retail SF (HRSF) program is a crucial service to the mission of the Office of Economic and Workforce (OEWD) Invest In Neighborhoods Business Technical Assistance programs. HRSF is mandated by a 2013 City ordinance (San Francisco Admin Code, No. 193-13) and OEWD is required to implement it, with funding coming from soda tax revenue. The Department utilizes a contractor to provide as-needed, specialized consulting services to merchants, a resource the Department would not be able to offer without the support of a qualified contractor. Denial of this request would hinder OEWD's ability to implement HRSF, a program greatly needed by small businesses, and a program that has proven to be doing well in increasing access to affordable healthy foods and increasing small business revenues. In addition, denial of this authorization would prevent OEWD from fulfilling current commitments to small businesses participating in the program and adding any new participants to the program.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Yes

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

### 2. Reason(s) for the Request

A. Display all that apply

✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Explain the qualifying circumstances:

This is a short-term project which requires specific skills.

B. Reason for the request for modification:

This modification requests adding \$270,000 and an additional one year of time in order to extend programming to respond to COVID-related delays and demand for this City ordinance-mandated technical assistance program.

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: The contractor will need to have expertise and verifiable experience in the following activities, to include but not limited to: 1) Grocery and Specialty Store Design 2) Store and Retail Space Planning 3) Refrigeration and Grocery Store equipment knowledge, expertise, and ability to purchase 4) Ability to provide individual and group technical assistance and expert advice on grocery store operations to business owners with varying levels of capacity 5) Produce Merchandising and Pricing 6) Healthy Food Product Merchandising and Pricing
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst; 1825, Prnpl Admin Analyst II; 5212, Engineer/Architect Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, through City funding the contractor will provide metro shelving, refrigeration and point of sale units as an incentive to the business owners.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  This project is short-term, intermittent, and requires specific skills.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Because of the high level of specialized skills needed, it would not be practical to adopt a new civil service class to perform this work. OEWD's Invest in Neighborhoods team has a Senior Community Development Specialist I (9774) staffing the project as Project Manager.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - While the contractor will be advising Department staff on ways to improve the program, the primary focus will be on deploying resources directly to OEWD's small business clients. It is not practical to train employees on this specific knowledge and expertise.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>08/24/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness, 5th Floor, San Francisco, CA, 94103

\*

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42645 - 18/19

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

### Choi, Suzanne (HRD)

From: dhr-psccoordinator@sfgov.org on behalf of marissa.bloom@sfgov.org

**Sent:** Monday, August 24, 2020 3:13 PM

**To:** Bloom, Marissa (ECN); amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26

@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Collins, Jenny (ECN); DHR-

PSCCoordinator, DHR (HRD)

**Subject:** Receipt of Modification Request to PSC # 42645 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$270,000 for services for the period October 1, 2020 – June 30, 2022. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/15422

Email sent to the following addresses: L21PSCReview@ifpte21.org pkim@ifpte21.org eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ecassidy@ifpte21.com amakayan@ifpte21.org

# Additional Attachment(s)

# \*\*\* PRESS RELEASE \*\*\* MAYOR MARK FARRELL AND SUPERVISOR MALIA COHEN ANNOUNCE \$10 MILLION IN ANNUAL FUNDING TO REDUCE HEALTH DISPARITIES

### MayorsPressOffice, MYR (MYR)

Tue 5/29/2018 10:26 AM

Deleted Items

To: MayorsPressOffice, MYR (MYR) < mayorspressoffice@sfgov.org >;

1 attachments (138 KB)

5.29.18 Soda Tax Health Funding.pdf;

### FOR IMMEDIATE RELEASE:

Tuesday, May 29, 2018

Contact: Mayor's Office of Communications, 415-554-6131

### \*\*\* PRESS RELEASE \*\*\*

### MAYOR MARK FARRELL AND SUPERVISOR MALIA COHEN ANNOUNCE \$10 MILLION IN ANNUAL FUNDING TO REDUCE HEALTH DISPARITIES

Additional funding made possible from voter-approved soda tax revenue will address inequities in underserved communities

**San Francisco**, **CA**— Mayor Mark Farrell and Supervisor Malia Cohen today announced that the City will spend \$10 million annually in soda tax revenue to address health inequities, with a specific focus on improving outcomes among low-income communities and communities of color.

Historically, soda consumption has been higher in low-income communities, which subsequently have disproportionately high rates of obesity, heart disease and diabetes. The funding will support health education, physical activity and food access programs and campaigns to raise awareness about the consumption of sugary drinks.

"Whether encouraging more physical activity or promoting healthy eating campaigns, this budget will help provide solutions to the epidemics of obesity and heart disease in our underserved communities," said Mayor Farrell. "This community-led effort will ensure that our youth and families have healthy and active programs to enjoy."

"As the sponsor of this law, I am proud to stand with the community and uphold the promise of directing soda tax revenue towards reducing health disparities for people of color and working class people," said Supervisor Malia Cohen. "These dollars will be invested in creative programming that decrease sugary drink consumption and increase water intake. Most importantly, those spending most on the tax will see a direct reinvestment in their communities towards health education and disease prevention."

Of the \$10 million in additional annual funding, \$4.5 million will be administered as grants to community-based organizations serving low-income communities and communities of color, with a focus on preventive health measures. An additional \$2.5 million will be allocated through the San Francisco Unified School District (SFUSD)

to support efforts to improve food and water access, and oral health services in schools. This includes improved nutrition, student-led efforts to reduce soda consumption and the installation of water stations in the 23 remaining schools that do not have them.

"The San Francisco Unified School District is uniquely positioned to leverage its scale and role to prevent sugar sweetened beverage related diseases, such as obesity and Type 2 Diabetes, and to disrupt and reverse health inequities in our community," said SFUSD Superintendent Dr. Vincent Matthews. "The Sugar-Sweetened Beverage Tax revenue will increase our capacity to prepare students for learning and to practice healthy habits. As educators, we're committed to the overall wellbeing of our students. This tax revenue will allow us to expand access to nutritious meals made of quality ingredients and locally grown produce, install more water hydration stations in our schools, increase access to dental care, and establish robust nutrition education and student engagement programs to support healthy choices."

The funding will also support food security through healthy eating vouchers, to be administered by community-based organizations and faith-based organizations. In addition, the tax measure will also expand peer programming at HOPE SF housing sites in communities impacted by health disparities. It will also support the City's Peace Parks program, the successful Healthy Retail program and several oral health task forces across the city.

"Sugary beverages pose a major health risk because they increase the risk of chronic illnesses like diabetes, obesity and heart disease and cause tooth decay," said San Francisco Health Officer Dr. Tomas Aragon. "These products target consumers with promises of happiness that can't be kept. It is great that San Francisco will be able to support programs and services in health education, physical activity, food access and to raise awareness about the consumption of sugary drinks."

Mayor Farrell and Supervisor Cohen largely accepted the recommendations of the Sugary Drinks Distribution Tax Advisory Committee (SDDTAC) on a funding plan for the tax measure. The Committee began meeting in December 2017, and offered data-based recommendations regarding tax expenditures in April 2017.

The committee's recommendations focused on prevention and direct investments in communities that are the hardest hit by chronic disease and are often the target of marketing campaigns from the sugar-sweetened beverage industry. In addition to providing recommendations, the committee is also tasked with evaluating the effectiveness of the tax-funded programs.

"It's gratifying to see the result of many years of collective effort by UCSF, UC Berkeley, Stanford and SFDPH scientists, SF policymakers and local health advocates," said Roberto Vargas, co-chair of the soda tax committee. "Mayor Farrell's budget proposal strongly supports the recommendations of the SDDTAC, supports evidence-based approaches, and lives up to San Francisco's commitment to reinvesting these dollars back into the communities most targeted by the soda industry, and most impacted by disease associated with consuming sugary drinks."

"I think this is a huge win," said Joi Jackson-Morgan, co-chair of the soda tax committee. "Sugary beverages have a significant impact on our community and now we're giving families the tools and support to invest in their health."

In 2016, more than 62 percent of San Francisco residents approved the Soda and Sugary Beverages Tax measure, which imposed a tax of one cent per ounce on the distribution of certain sugary beverages in the city.

###

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>ECONOMIC</u>	AND WORKFOR	RCE DEVELOP	MENT ECN	Dept. C	Code: <u>ECN</u>	
Type of Request:	☑Initial	□Modifica	☐ Modification of an existing PSC (PSC #)			
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Service: Consulting - Healthy Retail SF						
Funding Source: General Fund PSC Duration: 2 years 18 weeks						
PSC Amount: \$240,000						

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

Contractor will assist with the implementation of Healthy Retail SF, a City ordinance-mandated technical assistance program designed to increase access to healthy, affordable food. Contractor will be the lead consultant, supporting small businesses with space design, produce consulting, equipment needs, physical improvements and related activities. Contractor will also assist with client identification, conduct assessments of businesses, help create an individual development plan (IDP), provide individualized technical support to business clients based on the IDP, help with tracking progress, and follow up with the client and modify the approach to best suit the client's needs. Contractor will provide direct and focused technical assistance, in individual and group settings if needed. Contractor will also provide equipment, materials, and supplies as outlined in the IDPs to the small businesses.

- B. Explain why this service is necessary and the consequence of denial:
- The Healthy Retail SF (HRSF) program is a crucial service to the mission of the Office of Economic and Workforce (OEWD) Invest In Neighborhoods Business Technical Assistance programs. HRSF is mandated by a 2013 City ordinance (San Francisco Admin Code, No. 193-13) and OEWD is required to implement it, with funding coming from soda tax revenue. The Department utilizes a contractor to provide as-needed, specialized consulting services to merchants, a resource the Department would not be able to offer without the support of a qualified contractor. Denial of this request would hinder OEWD's ability to implement HRSF, a program greatly needed by small businesses, and a program that has proven to be doing well in increasing access to affordable healthy foods and increasing small business revenues. In addition, denial of this authorization would prevent OEWD from fulfilling current commitments to small businesses participating in the program and adding any new participants to the program.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Some of these services have been provided through agreements authorized under PSC #31212-15/16 (attached). PSC #31212-15/16 covers a broader set of design and technical assistance services (many of which are in line with this request), however, this request includes specialized consulting needs that are unique to the Healthy Retail SF program.
- D. Will the contract(s) be renewed? Unknown at this time.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.

  not applicable

### 2. Reason(s) for the Request

- A. Indicate all that apply (be specific and attach any relevant supporting documents):
- ✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- B. Explain the qualifying circumstances:

This is a short-term project which requires specific skills.

### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: The contractor will need to have expertise and verifiable experience in the following activities, to include but not limited to: 1) Grocery and Specialty Store Design 2) Store and Retail Space Planning 3) Refrigeration and Grocery Store equipment knowledge, expertise, and ability to purchase 4) Ability to provide individual and group technical assistance and expert advice on grocery store operations to business owners with varying levels of capacity 5) Produce Merchandising and Pricing 6) Healthy Food Product Merchandising and Pricing
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst; 1825, Prnpl Admin Analyst II; 5212, Engineer/Architect Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, through City funding the contractor will provide metro shelving, refrigeration and point of sale units as an incentive to the business owners.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

We have connected with other City Departments that may have specialized staff in this field, such as the Department of Public Health (a partner in the Healthy Retail SF initiative). At this time, no expert City staff are available to deliver these services.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  This project is short-term, intermittent, and requires specific skills.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Because of the high level of specialized skills needed, it would not be practical to adopt a new civil service class to perform this work. OEWD's Invest in Neighborhoods team has a Senior Community Development Specialist I (9774) staffing the project as Project Manager.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. While the contractor will be advising Department staff on ways to improve the program, the primary focus will be on deploying resources directly to OEWD's small business clients. It is not practical to train employees on this specific knowledge and expertise.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>01/03/2019</u>, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness, 5th Floor San Francisco, CA, 94103

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42645 - 18/19

DHR Analysis/Recommendation:
Commission Approval Required
03/04/2019 DHR Approved for 03/04/2019

action date: 03/04/2019
Approved by Civil Service Commission

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>GENERAL SERVICES AGENCY - PUBLIC WORKS</u> Dept. Code: <u>DP</u>					Code: <u>DPW</u>	
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 35314 - 18/19)				
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Serv	ice: <u>As Needed Cr</u>	ane Operator ar	nd Crane Services			
Funding Source: <u>DPWS000795</u>						
PSC Original	Approved Amoun	t: <u>\$100,000</u>	PSC Original Approved Duration: 03/11/19 - 03/10/22 (3 years 1 hour)			
DCC Mad#1 Amazonati, 6350,000 DCC Mad#1 Downstians, 03/11/33,03/16/35/3 consec						

PSC Mod#1 Amount: \$250,000 PSC Mod#1 Duration: 03/11/22-03/16/25 (3 years 6

<u>days)</u>

PSC Cumulative Amount Proposed: \$350,000 PSC Cumulative Duration Proposed: 6 years 1 week

### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

Crane services to hoist materials from one location to another or to and from a roof. Services will differ based on project scope and complexity of the project. The weight and type of the materials to be craned, and the height and reach of the crane will need to be evaluated for each project. As a result, different types of cranes and operator requirements will be utilized throughout the course of this PSC. For example, some project may require vendor to have crane specifications and lifting capacities of 90 tons, 140 feet of height and 58 feet of reach.

### **Scope Change**

Add the following language to the original Description of Work: 'This contract shall be used exclusively for Crane Rental Services; no other services shall be utilized.'

- B. Explain why this service is necessary and the consequence of denial:
- The City and County of San Francisco, including SF Public Works, does not have a crane or a crane operator who can perform the work described above. If this PSC is denied, projects in which a crane and crane operator are essential for the completion of projects cannot be performed. Such project include the replacement of the Public Library's computer room cooling system.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Yes, see original PSC 35314-1819 approval
- D. Will the contract(s) be renewed?

Yes, if there continues to be a need for such services.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

Extend duration in anticipation of greater future usage two Contractors who were awarded the contract are Sheedy and Professional Tree Care. Bureau of Building Repair (BBR) is anticipating an increased need for craning/lifting/rigging services. We have a project with Human Services Agency (HAS) to replace the heating/cooling system on the roof of 1235 Mission that will need seven or eight lifts. We also have Roofers in BBR now and they often need crane services, sometimes on short notice if there is a roof leak. We also have been doing more solar roof projects also. The rising costs of construction also justify having a higher ceiling for this work. Other bureaus in Public Works may also need crane services from time to time.

### 2. Reason(s) for the Request

- A. Display all that apply
- ✓ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

### Explain the qualifying circumstances:

Services will be on an as-needed basis. Public Works is contacted by other City departments for repair and maintenance work throughout the year, and so cannot anticipate when equipment needs to be fixed, the cost, nor if crane services will be needed. If the services cannot be completed without crane services, Public Works will contact a vendor who can perform this type of work. The City lacks cranes to hoist things to and from roof tops.

### B. Reason for the request for modification:

Increase the amount of the contract from \$100k to \$350K and extend duration, in anticipation of greater future usage. Bureau of Building Repair (BBR) is anticipating an increased need for craning/lifting/rigging services. We have a project with Human Services Agency (HAS) to replace the heating/cooling system on the roof of 1235 Mission that will need seven or eight lifts. We also have Roofers in BBR now and they often need crane services, sometimes on short notice if there is a roof leak. We also have been doing more solar roof projects also. The rising costs of construction also justify having a higher ceiling for this work. Other bureaus in Public Works (PW) may also need crane services from time to time.

### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Cranes are operated by operators certified by NCCCO (National Commission for the Certification of Crane Operators). The Department of Public Works does not have any employees who are certified to operate a crane, nor does it have cranes for employees to perform this task.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7108, Heavy Equip Ops Asst Sprv; 7110, Mobile Equipment Asst Sprv; 7208, Heavy Equipment Ops Sprv; 7210, Mobile Equipment Supervisor; 7328, Operating Engineer, Universal; 9331, Piledriver Engine Operator;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The outside operator will provide a crane specific for the needs of the work to be done.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

Civil classifications exist. 7108, 7110, 7208, 7210, 7221, 7328,730, 7424, 9331 under Operating Engineers Local Union No. 3. There is no one in these roles and the amount of work and type of crane needed is unpredictable.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Current classifications already exist and could be used, but have not because there is not enough work on a regular basis.

### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

Training will not be offered as this is a very specialized task that requires a crane operator certification.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Sheedy and Professional Tree Care awarded through RFP 70310

**7.** <u>Union Notification</u>: On <u>07/09/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Operating Engineers, Local 3;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Alexander Burns</u> Phone: <u>415-554-6411</u> Email: <u>alexander.burns@sfdpw.org</u>

Address: 1155 Market St. 4th floor, San Francisco, CA 94102

### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>35314 - 18/19</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 **Civil Service Commission Action:** 

# **Receipt of Union Notification(s)**

### Choi, Suzanne (HRD)

From: Macaranas, Belle (DPW)

**Sent:** Thursday, July 09, 2020 3:32 PM **To:** David Tuttle; vjames@oe3.org

Cc: DHR-PSCCoordinator, DHR (HRD); Jew, Jonathan (ADM); Barlow, Timothy (DPW)

Subject: FW: Receipt of Modification Request to PSC # 35314 - 18/19 - MODIFICATIONS

**Attachments:** PSC 35314-1819 Mod 1 Request 6.30.20.pdf

Hello Local 3,

Please see union notification for modification request (see below) for PSC 35314-18/19 Crane Operator and Crane Services. Attached is the PSC Modification request form attached for your reference.

For questions about the request, please contact Jonathan Jew and Timothy Barlow cc'ed in this email.

**Belle Macaranas**Contract Administration Division

San Francisco Public Works | City and County of San Francisco | <u>sfpublicworks.org</u> | <u>twitter.com/sfpublicworks</u> 49 South Van Ness Avenue, Suite 1600 | San Francisco, CA 94103

### ----Original Message-----

From: dhr-psccoordinator@sfgov.org <dhr-psccoordinator@sfgov.org> On Behalf Of alexander.burns@sfdpw.org Sent: Tuesday, June 30, 2020 5:02 PM

To: Burns, Alexander (DPW) <alexander.burns@sfdpw.org>; Macaranas, Belle (DPW) <belle.macaranas@sfdpw.org>;

DHR-PSCCoordinator, DHR (HRD) < dhr-psccoordinator@sfgov.org>

Subject: Receipt of Modification Request to PSC # 35314 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a modification request for a Personal Services Contract (PSC) for \$250,000 for services for the period March 11, 2022 – March 16, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/15221

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present.

Either you selected none or there is no email entered in the system by that particular union

# Additional Attachment(s)

## City and County of San Francisco

## **Request for Qualifications:**

### **Crane Services**



Date Issued: November 26, 2019

Pre-Proposal Conference: 2323 Cesar Chavez Building A

Mel Baker Conference Room

San Francisco, CA 94124

December 12, 2019 2:00 p.m. (PST)

Proposal due: **January 6, 2020 2:00 p.m. (PST)** 

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### **Appendices:**

Appendix A: Bid and Contract Terms (P-245)

Attachment A to Appendix A: Equipment Lease Attachment (P-520)

Appendix B: Company Information

Appendix C: Bid Questionnaire

Appendix D: Release of Liability for References

Appendix E: First Source Hiring Form

Appendix F: HCAO and MCO Declaration Form

### I. INTRODUCTION AND SCHEDULE

### A. General

This Request for Qualifications (RFQ) is being issued by the City and County of San Francisco Office of Contract Administration (OCA) on behalf of San Francisco Public Works Bureau of Building Repair (Sheet Metal, Steamfitter, Plumbing, Soft Floor, Carpentry, Electric, Lock, Roofing, Glass, and Engineer Shops), Bureau of Urban Forestry, Bureau of Street Environmental Services, and Bureau of Street and Sewer Repair at 2323 Cesar Chavez Street, San Francisco. OCA, in conjunction with the Department, is seeking qualifications from Suppliers to provide Crane Services to the City and San Francisco Public Works, including but not limited to:

Boom Trucks, Hydraulic Cranes, Roof Mount Cranes, Specialized Lifting Equipment, and Hydraulic Platform Trailers, Jibs,

### Examples include:

- 30 ton Spyder Crane
- 350 ton Truck Crane with Luffing Jib
- 500 ton Truck Crane with Luffing Jib and/or Y Guys
- Roof Mount Cranes (30 Ton and 50 Ton) Derricks and Chicago Booms
- Hydraulic Gantry (800 Ton Capacity and 100 Ton Capacity)
- Strand Jack Systems (440T PSC System and 48T Scanada System)
- Hydraulic Platform Trailers:
  - o 4-Axle line, 136 Ton Capacity (without operator)
  - o 6-Axle line, 204 Ton Capacity
  - o 4-Axle Self-Propelled, 180 Ton Capacity
- Flying Jib
- Hydraulic Cranes:
  - o 350 ton All rerrain Crane; Boom Length Feet 197; Jib Length Feet 167
  - 350 ton All Terrain Crane Luffing Jib; Boom Length Feet 160; Jib Length Feet
     200
  - o 500 ton All Terrain Crane; Boom Length Feet 197; Jib Length Feet 167
  - 500 ton All Terrain Crane Luffing Jib; Boom Length Feet 197; Jib Length Feet
     276
- Roof Top Hoisting Gear:
  - o 30 ton Roof Mount Crane
  - o 50 ton Roof Mount Crane
  - o 7 ton Guy Derricks
  - o 10 ton Chicago Booms
  - 3.5 ton Portable Derrick
- Special Heavy Hauling Equipment and Specialized Lifting Equipment:
  - o Heavy Duty Prime Movers to 4 50 11 P
  - o Hydraulic Platform Trailers 44 Axle Lines, Self-Propelled 4 Axle Lines
  - Hydraulic Jacking System 400 ton capacity

- o Hydraulic Gantrys 800 and 100 ton capacity
- o Hydraulic Jacks 400, 200, 100 tons
- o Strand Jack Heavy Lift System 440 ton capacity

Crane operators' responsibilities include, but are not limited to:

- Operating the crane
- Delivering the crane to the job site
- Setting up blocking for leveling outriggers (legs)
- Leveling/securing the crane
- Checking for overhead safety hazards
- Working with riggers to secure loads

This contract's scope of work specifically excludes any work done for projects related to Chapter 6 of the San Francisco Administrative Code, which governs Public Work or Improvement contracting policies and procedures, including the procurement of professional design, consulting and construction management services for Public Work or Improvement projects.

# **B.** Cooperative Agreement

The Director of Purchasing may allow other public agencies or non-profits made up of multiple public agencies to utilize this contract to obtain some or all of the commodities to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Contract. Pursuant to Section 21.16 of the San Francisco Administrative Code, other City Departments may also utilize the results of this competitive solicitation for their needs.

# C. Anticipated Contract Term

The contract shall have an original term of three (3) years. In addition, the City shall have four (4) options to extend the term for a period of one (1) year each, which the City may exercise in its sole, absolute discretion. The maximum contract term shall not exceed seven years.

# D. RFQ Schedule

The anticipated schedule for this solicitation is as follows:

Proposal Phase	<b>Tentative Date</b>
RFQ issued by the City	11/26/19
Pre-Proposal Conference	12/12/19 2:00PM (PST)
Deadline for Suppliers to submit questions in writing	12/20/19 2:00PM (PST)
Deadline for Suppliers to submit Proposals	01/06/20 2:00PM (PST)
Notice of Intent to Award	01/13/20
Final Award	01/21/20

# E. How to Register as a City Supplier

The following requirements pertain to Proposers not currently registered with the City as a Supplier. Proposers who have completed their Supplier registration and Proposers who will be submitting their proposal through an existing registered City Supplier may skip this section.

**Step 1:** Register as a PROPOSER at: <a href="https://sfcitypartner.sfgov.org/pages/index.aspx">https://sfcitypartner.sfgov.org/pages/index.aspx</a>

**Step 2:** Follow instructions for converting your PROPOSER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

\*\*\*\*\*

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- Chapter 12(B) and 12(C) Inquiries: For questions concerning the City's Chapter 12(B) and 12(C) Equal Benefits and Non Discrimination in Contracting requirements, go to <a href="https://www.sfgov.org/cmd">www.sfgov.org/cmd</a>.

# F. Contractors Unable to do Business with the City

## 1. Generally

Contractors that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Some of the laws are included in this RFQ, or in the sample terms and conditions attached.

# 2. Companies Headquartered in Certain States

This Contract is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into contracts with companies headquartered in states with laws that perpetuate discrimination against LGBT populations or where any or all of the work on the contract will be performed in any of those states. Proposers are hereby advised that Proposers which have their United States headquarters in a state on the Covered State List, as that term is defined in Administrative Code Section 12X.3, or where any or all of the work on the contract will be performed in a state on the Covered State List may not enter into contracts with the City. A list of states on the Covered State List is available at <a href="https://sfgsa.org/chapter-12x-anti-lgbt-state-ban-list">https://sfgsa.org/chapter-12x-anti-lgbt-state-ban-list</a>.

# G. Proposer Questions and Submissions

#### 1. Proposer Questions

Proposers shall address any questions regarding the RFQ to the Office of Contract Administration's liaison named here: Jonathan Jew, <u>jonathan.jew@sfgov.org</u>. Questions must be in writing and received no later than **2:00 p.m. Pacific Standard Time (PST) on Friday, December 20, 2019.** Postmarks will not be considered in judging the timeliness of submissions. Late submissions will not be considered. Each original proposal received will be screened to

ensure that all content required by this RFQ are included. Partial or complete omission of any required content may disqualify proposals from further consideration.

# 2. Proposal Format

Organizations interested in responding to this RFQ must submit information in response to each item requested in this RFQ and developed using the format provided. Information must be provided at a level of detail that enables effective evaluation and comparison between proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact your proposal's performance in the selection process.

# 3. Time and Place for Submission of Proposals

Proposals must be received by 2:00 p.m. Pacific Standard Time (PST) on Monday, January 6, 2020. Late submissions will not be considered. Each original proposal received will be screened to ensure that all content required by this RFQ are included. Partial or incomplete omission of any required content may disqualify proposals from further consideration.

Proposals **must** be submitted electronically before the due time, via the City's PeopleSoft Supplier Portal: <a href="https://sfcitypartner.sfgov.org/pages/index.aspx">https://sfcitypartner.sfgov.org/pages/index.aspx</a> or via electronic email to jonathan.jew@sfgov.org. Bids transmitted by fax, hard copy, or in person, will not be accepted.

#### H. Protest Procedures

# 1. Protest of Non-Responsiveness Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

# 2. Protest of Non-Responsible Determination

Within five working days of the City's issuance of a notice of a determination of non-responsibility, a supplier that would otherwise be the lowest responsive proposer may submit a written notice of protest. The supplier will be notified of any evidence reflecting upon their responsibility received from others or adduced as a result of independent investigation. The supplier will be afforded an opportunity to rebut such adverse evidence, and will be permitted to present evidence that they are qualified to perform the contract. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsibility. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance

procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

#### 3. Protest of Contract Award

Within five working days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

# 4. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Jonathan Jew, Assistant Purchaser City and County of San Francisco Office of Contract Administration City Hall, Room 430 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102

**Reference: RFQ 70310 Craning Services** 

## I. Contract Award

The City will select one or more proposers with whom the City shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time, City, in its sole discretion, may terminate negotiations.

#### II. PROPOSAL EVALUATIONS CRITERIA

Proposals will be evaluated based on the following criteria, each of which is addressed herein. The City reserves the right to inspect any Proposer's plant, fleet, and equipment to determine Proposer's preparedness prior to making an award.

<b>Evaluation Phase</b>	Evaluation Criteria
A. Minimum Qualifications Documentation	Pass/Fail
B. Price Proposal	Pass/Fail

## A. Minimum Qualifications (Pass/Fail)

Each proposal will be reviewed for initial determinations on whether Proposer meets Minimum Qualifications referenced in this section. This screening is a pass or fail determination as to whether the proposer has met the minimum qualifications. A proposal that fails to meet the minimum qualifications will not be eligible for consideration in the evaluation process.

The City reserves the right to request clarifications from Proposers prior to rejecting a proposal for failure to meet the minimum qualifications. Clarifications are limited exchanges between the City and Proposer for the purpose of clarifying certain aspects of the proposal and will not provide a proposer the opportunity to revise or modify its proposals.

Proposers must provide documentation that clearly demonstrates each minimum qualification listed below has been met. Documentation should be clearly marked as "MQ1", MQ2", etc... to indicate which Minimum Qualification it supports.

MQ	Description	<b>Documents to submit</b>
MQ1	<b>References</b> : Three (3) verifiable	Appendix D – Release of Liability
	references from current governmental,	and Client References
	commercial or institutional customers	
	showing a minimum of three (3) years of	
	experience within the last five (5) years of	
	providing Crane Operator and Crane	
	Services to the client.	
MQ2	Evidence that Proposer is 12B compliant	Supporting documents from the
	or able to provide pertinent information to	City verifying compliance or
	become compliant within 30 days.	pending compliance.
MQ3	Required Certifications: National	Provide documents verifying
	Commission for the Certification of Crane	NCCCO certification or pending
	Operators (NCCCO)	certification.
	, , ,	

#### B. Price Proposal (Pass/Fail)

Proposers shall provide Price Proposals consisting of, at a minimum, items for goods or services described in this RFQ. Proposer's Price Proposal should entail the list of goods or services offered by Proposer and clearly describe Proposer's pricing model and meet the requirements set forth below.

- **1. Product Descriptions:** Proposers proposing products shall include a complete description of the proposed product(s).
- **2. Pricing Support.** Proposers shall submit pricing based on commercial pricing practices, Proposer's commercial rate, and discounts offered to the City.

- **3. Pricing Narrative.** Proposers must submit a Pricing Narrative with their Proposal. The narrative should address the following points:
  - a. Indicate if any further discounts are offered, i.e. volume, quantity, prompt payment etc.
  - b. If the City is not offered discounts, terms and conditions equal to or better than your most favored customer (the lowest price), provide an explanation why.

#### III. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

# A. Errors and Omissions in RFQ

Proposers are responsible for reviewing all portions of this RFQ. Proposers are to promptly notify the Department, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFQ. Any such notification should be directed to the Department promptly after discovery, but in no event later than 72 hours prior to the date that proposals are due. Modifications and clarifications will be made by addenda as provided below.

# **B.** Objections to RFQ Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFQ, the proposer must, not less than 72 hours prior to the RFQ deadline, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

# C. Change Notices

The Department may modify the RFQ, prior to the proposal due date, by issuing an Addendum to the RFQ, which will be posted on the City's Supplier Portal, <a href="https://sfcitypartner.sfgov.org">https://sfcitypartner.sfgov.org</a>. The proposer shall be responsible for ensuring that its proposal reflects any and all RFQ Addendum(s) issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the proposer consult the website frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Bid Addendum(s). It is the responsibility of the proposer to check for any Addendum, Questions and Answers, and updates, which will be posted

# D. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for 90 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the proposal may remain valid beyond the 90 day period in the circumstance of extended negotiations.

# E. Revision of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the

same manner as the original. A revised proposal must be received on or before, but no later than the proposal due date and time.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.

At any time during the proposal evaluation process, the Department may require a proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

# F. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFQ or excuse the supplier from full compliance with the specifications of the RFQ or any contract awarded pursuant to the RFQ.

## **G.** Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFQ. Submissions of the RFQ will become the property of the City and may be used by the City in any way deemed appropriate.

# H. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the proposer is prohibited from making contributions to:

- The officer's re-election campaign
- A candidate for that officer's office
- A committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor.

Examples of initial contacts include: (1) a supplier contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations. Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

- 1. Criminal. Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
- **2.** Civil. Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
- **3.** Administrative. Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, Proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

# I. Public Access to Meetings and Records

If a proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the proposer must comply with Chapter 12L. The proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to proposer's meetings and records, and (2) a summary of all complaints concerning the proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

# J. Reservations of Rights by the City

The issuance of this RFQ does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

- 1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- 2. Reject any or all proposals;
- 3. Reissue a Request for Qualifications;
- 4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFQ, or the requirements for contents or format of the proposals;
- 5. Procure any materials, equipment or services specified in this RFQ by any other means; or

6. Determine that no project will be pursued.

#### K. No Waiver

No waiver by the City of any provision of this RFQ shall be implied from any failure by the City to recognize or take action on account of any failure by a proposer to observe any provision of this RFQ.

# L. Contract Requirements

The successful proposer will be required to enter into a contract substantially in the form of the Term Contract (P-245 and P-520), attached hereto as Appendix A. Please carefully review the Appendix A, and make any edits to the document, if necessary. Any changes made will have to be reviewed and approved by the City Attorney. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

# PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>GENERAL SE</u>	RVICES AGENO	CY - PUBLIC WOR	KS DPW	Dept. Co	ode: <u>DPW</u>
Type of Request:	☑Initial	$\square$ Modification	of an existing PS	SC (PSC #	)
Type of Approval:	<b>☑</b> Expedited	□Regular	□Annual	$\Box$ Continuing	$\square$ (Omit Posting)
Type of Service: As Needo	ed Crane Opera	ator and Crane So	<u>ervices</u>		
Funding Source: <u>DPWS00</u> PSC Amount: <u>\$100,000</u>	<u>0795</u>	PSC Est. Start Da	te: <u>03/11/2019</u>	PSC Est. End Date	e <u>03/10/2022</u>
<ol> <li>Description of Work         <ul> <li>A. Scope of Work/Services</li> <li>Crane services to hoist on project scope and concepts and reach of the and operator requirement require vendor to have reach.</li> </ul> </li> </ol>	materials from omplexity of th crane will nee ents will be uti	one location to e project. The w d to be evaluate lized throughout	eight and type of d for each projec t the course of th	f the materials to let. As a result, differis PSC. For examp	be craned, and the erent types of cranes le, some project may
B. Explain why this serv The City and County of who can perform the w are essential for the co Public Library's comput	San Francisco, ork described mpletion of pro	including SF Pub above. If this PSO ojects cannot be	olic Works, does r C is denied, proje	cts in which a crai	ne and crane operato
which a crane and oresponsive. Crane S	most recently a ervice has been operator are ne ervices were o rement issued	opproved PSC.  utilized via issuated on SFP btained through the PO under Pro	ance of Purchase ublic Works Yard purchase orders	Orders by Public or are several comp	Works for projects in anies that are very
D. Will the contract(s) be Yes, if there continues		or such services.			
E. If this is a request for PSC by another five not applicable		•	ers, or if your req	uest is to extend (	modify) an existing
2. Reason(s) for the Requ A. Indicate all that app		and attach any re	levant supportin	g documents):	
✓ Services required on	an as-needed,	intermittent, or	periodic basis (e.	g., peaks in workl	oad).
✓ Services that require operator).	resources that	the City lacks (e	.g., office space,	facilities or equipi	ment with an

#### B. Explain the qualifying circumstances:

Services will be on an as-needed basis. Public Works is contacted by other City departments for repair and maintenance work throughout the year, and so cannot anticipate when equipment needs to be fixed, the cost, nor if crane services will be needed. If the services cannot be completed without crane services, Public Works will contact a vendor who can perform this type of work. The City lacks cranes to hoist things to and from roof tops.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Cranes are operated by operators certified by NCCCO (National Commission for the Certification of Crane Operators). The Department of Public Works does not have any employees who are certified to operate a crane, nor does it have cranes for employees to perform this task.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7108, Heavy Equip Ops Asst Sprv; 7110, Mobile Equipment Asst Sprv; 7208, Heavy Equipment Ops Sprv; 7210, Mobile Equipment Supervisor; 7328, Operating Engineer, Universal; 9331, Piledriver Engine Operator;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The outside operator will provide a crane specific for the needs of the work to be done.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

None. The City does not have a certified crane operator and does not have the cranes to do this work.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  Civil classifications exist. 7108, 7110, 7208, 7210, 7221, 7328,730, 7424, 9331 under Operating Engineers Local Union No. 3. There is no one in these roles and the amount of work and type of crane needed is unpredictable.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Current classifications already exist and could be used, but have not because there is not enough work on a regular basis.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

  No. Training will not be offered as this is a very specialized task that requires a crane operator certification.
- C. Are there legal mandates requiring the use of contractual services? No.
- Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

No.

**7.** <u>Union Notification</u>: On <u>04/26/2019</u>, the Department notified the following employee organizations of this PSC/RFP request:

Operating Engineers, Local 3

☐ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Alexander Burns</u> Phone: <u>415-554-6411</u> Email: <u>alexander.burns@sfdpw.org</u>

Address: 1155 Market St. 4th floor San Francisco, CA 94102

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>35314 - 18/19</u>

DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 05/13/2019

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	ECONOMIC AND	WORKFORCE D	<u>EVELOPMENT</u>	Dept. (	Code: <u>ECN</u>			
Type of Request:	□Initial	✓Modificatio	n of an existing PSC	(PSC # 31212 - 15	5/16)			
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)			
Type of Servi	ice: <u>Consulting - S</u>	F Shines Facade	& Tenant Improven	nents				
Funding Sou	Funding Source: General Fund							
PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/16 - 06/30/18 (2 years 12 weeks)								
PSC Mod#1 A	PSC Mod#1 Amount: \$800,000 PSC Mod#1 Duration: 07/01/18-06/30/19 (1 year)							
PSC Mod#2 A	Amount: <u>no amou</u>	nt added	PSC Mod#2 Duration: <u>07/01/19-12/31/20 (1 year weeks)</u>					
PSC Mod#3 A	Amount: <u>no amou</u>	nt added	PSC Mod#3 Durati	on: <u>01/01/21-12</u>	2/31/22 (2 years)			

# 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

In an effort to improve the City and County San Francisco's business corridors, contractors will provide design and technical assistance for the SF Shines program to property and business owners to improve commercial façades, business interiors and provide accessibility upgrades. Contractors will develop design concepts and permit drawings necessary to obtain building approvals with the departments of Planning, Building Inspection and the Mayor's Office on Disability. Contractors will assist in the bidding and construction of façade and tenant improvement projects.

PSC Cumulative Amount Proposed: \$900,000 PSC Cumulative Duration Proposed: 6 years 39 weeks

B. Explain why this service is necessary and the consequence of denial:

The SF Shines program is one of the Mayor's Invest in Neighborhoods initiatives created to increase economic vitality along the City's diverse commercial corridors, attract new businesses, and provide support to existing businesses. The SF Shines program is the only program that provides direct physical improvements to commercial businesses in low income neighborhoods. The San Francisco Office of Economic and Workforce Development (OEWD) currently has over 20 projects in progress. If the service is denied, the program will be substantially compromised. Through this service, SF Shines will offer high quality design assistance to small business owners to implement designs that are consistent with the program goals and have the largest impact for the grant investment. This program results in increased City tax revenue by improving existing businesses in commercial corridors, removing barriers to accessibility, increasing neighborhood safety and encouraging investment in the City's diverse neighborhoods.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

Yes, this is a request to extend the existing authorization.

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The SF Shines program of OEWD's Invest in Neighborhood initiatives is the only program which provides direct physical improvements to commercial businesses in low income neighborhoods, which is needed now more than ever. The requested modification does not add funding, but requests additional time in which to conduct the existing programming, which encountered delays due to COVID.

## 2. Reason(s) for the Request

A. Display all that apply

☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Explain the qualifying circumstances:

This is a short term project that requires special skills. Project types and duration vary greatly. SF Shines projects may include design of new signage, accessibility improvements, full façade redesign and tenant improvements for a variety of business types. Architects must have experience in commercial design including presenting and developing concepts to small business owners/building owners, obtaining building approvals and working with contractors.

B. Reason for the request for modification:

This requests adds two years to the existing authorization, with no additional funding. The services are in great demand, but due to COVID, service delivery has slowed considerably, and more time is needed to complete the existing projects.

## 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Contractors must have experience in neighborhood revitalization through physical improvements for commercial corridors. The contractors must have skills in commercial façade and tenant improvements, signage and branding, facilitating and presenting designs to small business and building owners and city agencies, obtaining building and permit approvals, and working with general contractors and subcontractors.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5212, Engineer/Architect Principal; 5268, Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

This project is short term, intermittent, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This project is short term and the work is highly specialized. Having experience in commercial façade and tenant improvement design, neighborhood revitalization, facilitating, presenting and developing designs for small business owners/building owners, obtaining building approvals and working with contractors would not be practical for a new architect civil class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. Training employees by contractor is not necessary. The SF Shines program has a full time project manager who has experience working with architects on these types of projects. Contractors will attend a one-hour kick off meeting with the project manager to go over the SF Shines program guidelines and sample projects.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement. No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Yes, some of the existing contracts will be modified for time.

7. Union Notification: On 07/24/20, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103

PSC#<u>31212 - 15/16</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020

Civil Service Commission Action:

# **Receipt of Union Notification(s)**

# Receipt of Modification Request to PSC # 31212 - 15/16 - MODIFICATIONS

dhr-psccoordinator@sfgov.org <dhr-psccoordinator@sfgov.org> on behalf of

Jenny.Collins@sfgov.org < jenny.collins@sfgov.org >

Fri 7/24/2020 4:17 PM

To: Collins, Jenny (ECN) < jenny.collins@sfqov.org>; WendyWong26@yahoo.com < WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org >; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; pkim@ifpte21.org <pkim@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; Bloom, Marissa (ECN) <marissa.bloom@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccoordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period January 1, 2021 – December 31, 2022. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in initial PSC and the cumulative amount of the request is over \$100,000, there a 60 day review period for SEIU

After logging into the system please select link below:

# http://apps.sfgov.org/dhrdrupal/node/6617

Email sent to the following addresses: L21PSCReview@ifpte21.org amakayan@ifpte21.org pkim@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com

# Additional Attachment(s)

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT Dept. Code: ECN Type of □Initial ✓ Modification of an existing PSC (PSC # 31212 - 15/16) Request: ☐ Expedited **☑** Regular ☐ Continuing ☐ (Omit Type of □ Annual Approval: Posting) Type of Service: Consulting - SF Shines Facade & Tenant Improvements Funding Source: General Fund PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/16 -06/30/18 (2 years 12 weeks) PSC Mod#1 Amount: \$800,000 PSC Mod#1 Duration: 07/01/18-06/30/19 (1 year) PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: <u>07/01/19-12/31/20 (1 year 26</u> weeks)

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

PSC Cumulative Amount Proposed: \$900,000

In an effort to improve the City and County San Francisco's business corridors, contractors will provide design and technical assistance for the SF Shines program to property and business owners to improve commercial façades, business interiors and provide accessibility upgrades. Contractors will develop design concepts and permit drawings necessary to obtain building approvals with the departments of Planning, Building Inspection and the Mayor's Office on Disability. Contractors will assist in the bidding and construction of façade and tenant improvement projects.

PSC Cumulative Duration Proposed: 4 years 39 weeks

- B. Explain why this service is necessary and the consequence of denial:
- The SF Shines program is one of the Mayor's Invest in Neighborhoods initiatives created to increase economic vitality along the City's diverse commercial corridors, attract new businesses, and provide support to existing businesses. The SF Shines program is the only program that provides direct physical improvements to commercial businesses in low income neighborhoods. The San Francisco Office of Economic and Workforce Development (OEWD) currently has over 20 projects in progress. If the service is denied, the program will be substantially compromised. Through this service, SF Shines will offer high quality design assistance to small business owners to implement designs that are consistent with the program goals and have the largest impact for the grant investment. This program results in increased City tax revenue by improving existing businesses in commercial corridors, removing barriers to accessibility, increasing neighborhood safety and encouraging investment in the City's diverse neighborhoods.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  Yes, this is a request to extend the existing authorization

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

## 2. Reason(s) for the Request

A. Display all that apply

☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

## Explain the qualifying circumstances:

This is a short term project that requires special skills. Project types and duration vary greatly. SF Shines projects may include design of new signage, accessibility improvements, full façade redesign and tenant improvements for a variety of business types. Architects must have experience in commercial design including presenting and developing concepts to small business owners/building owners, obtaining building approvals and working with contractors.

#### B. Reason for the request for modification:

This request is for 1 year, 27 weeks of additional time on the authorization, to meet the needs of additional local businesses seeking assistance through the program.

## 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Contractors must have experience in neighborhood revitalization through physical improvements for commercial corridors. The contractors must have skills in commercial façade and tenant improvements, signage and branding, facilitating and presenting designs to small business and building owners and city agencies, obtaining building and permit approvals, and working with general contractors and subcontractors.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5212, Engineer/Architect Principal; 5268, Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  This project is short term, intermittent, and requires specific skills.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This project is short term and the work is highly specialized. Having experience in commercial façade and tenant improvement design, neighborhood revitalization, facilitating, presenting and developing

designs for small business owners/building owners, obtaining building approvals and working with contractors would not be practical for a new architect civil class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. Training employees by contractor is not necessary. The SF Shines program has a full time project manager who has experience working with architects on these types of projects. Contractors will attend a one-hour kick off meeting with the project manager to go over the SF Shines program guidelines and sample projects.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Yes, some of the existing contracts will be modified for time.

**7.** <u>Union Notification</u>: On <u>03/06/19</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31212 - 15/16

DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 03/19/2019

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>ECONOMIC AND WORKFORCE DEVELOPM</u>				Dept. (	Code: <u>ECN</u>	
Type of Request:	$\square$ Initial	✓ Modification of an existing PSC (PSC # 31212 - 15/16)				
Type of Approval:	$\square$ Expedited	<b>☑</b> Regular	$\square$ Annual	$\square$ Continuing	$\square$ (Omit Posting)	
Type of Servic	Type of Service: Consulting - SF Shines Facade & Tenant Improvements					
Funding Source	e: <u>General Fund</u>					
PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/16 - 06/30/18 (2 years 12 weeks)						
PSC Mod#1 Amount: \$800,000 PSC Mod#1 Duration: 07/01/18-06/30/19 (1 year)					8-06/30/19 (1 year)	
PSC Cumulativ	PSC Cumulative Amount Proposed: \$900,000 PSC Cumulative Duration Proposed: 3 years 12 weeks					

# 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

In an effort to improve the City and County San Francisco's business corridors, contractors will provide design and technical assistance for the SF Shines program to property and business owners to improve commercial façades, business interiors and provide accessibility upgrades. Contractors will develop design concepts and permit drawings necessary to obtain building approvals with the departments of Planning, Building Inspection and the Mayor's Office on Disability. Contractors will assist in the bidding and construction of façade and tenant improvement projects.

B. Explain why this service is necessary and the consequence of denial:

The SF Shines program is one of the Mayor's Invest in Neighborhoods initiatives created to increase economic vitality along the City's diverse commercial corridors, attract new businesses, and provide support to existing businesses. The SF Shines program is the only program that provides direct physical improvements to commercial businesses in low income neighborhoods. The San Francisco Office of Economic and Workforce Development (OEWD) currently has over 20 projects in progress. If the service is denied, the program will be substantially compromised. Through this service, SF Shines will offer high quality design assistance to small business owners to implement designs that are consistent with the program goals and have the largest impact for the grant investment. This program results in increased City tax revenue by improving existing businesses in commercial corridors, removing barriers to accessibility, increasing neighborhood safety and encouraging investment in the City's diverse neighborhoods.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 31212 15/16
- D. Will the contract(s) be renewed? Unknown at this time.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

# 2. Reason(s) for the Request

A. Display all that apply

☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

# Explain the qualifying circumstances:

This is a short term project that requires special skills. Project types and duration vary greatly. SF Shines projects may include design of new signage, accessibility improvements, full façade redesign and tenant improvements for a variety of business types. Architects must have experience in commercial design including presenting and developing concepts to small business owners/building owners, obtaining building approvals and working with contractors.

# B. Reason for the request for modification:

The Department identified additional resources to allocate to the program, which enables us to provide a more robust set of design services to a much larger pool of business customers. Additionally, extending the term by one (1) year.

# 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Contractors must have experience in neighborhood revitalization through physical improvements for commercial corridors. The contractors must have skills in commercial façade and tenant improvements, signage and branding, facilitating and presenting designs to small business and building owners and city agencies, obtaining building and permit approvals, and working with general contractors and subcontractors.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5212, Engineer/Architect Principal; 5268, Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

**Not Applicable** 

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  This project is short term, intermittent, and requires specific skills.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This project is short term and the work is highly specialized. Having experience in commercial façade and tenant improvement design, neighborhood revitalization, facilitating, presenting and developing designs for small business owners/building owners, obtaining building approvals and working with contractors would not be practical for a new architect civil class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. Training employees by contractor is not necessary. The SF Shines program has a full time project manager who has experience working with architects on these types of projects. Contractors will attend a one-hour kick off meeting with the project manager to go over the SF Shines program guidelines and sample projects.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>03/21/16</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Kris Damalas Phone: 415-701-4870 Email: kristine.damalas@sfgov.org

Address: 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31212 - 15/16

DHR Analysis/Recommendation:
Commission Approval Required
05/02/2016 DHR Approved for 05/02/2016

05/02/2016
Approved by Civil Service Commission

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	PUBLIC UTILITIES	COMMISSION	Dept. Code: <u>PUC</u>			
Type of Request:	□Initial	✓Modification	of an existing PSC	(PSC # 49868 - 17	/18)	
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Servi	ice: Tunnel Enginee	ering Design (PRC	<u>).0101)</u>			
Funding Soul	rce: <u>SSIP Funded</u>					
PSC Original Approved Amount: \$7,000,000 PSC Original Approved Duration: 08/01/18 - 08/01/20 (2 years 1 day)						
PSC Mod#1 Amount: \$2,700,000 PSC Mod#1 Duration: 08/01/20-11/01/23 (3 years 13 weeks)						
PSC Cumulat	PSC Cumulative Amount Proposed: \$9,700,000 PSC Cumulative Duration Proposed: 5 years 13 weeks					

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The primary scope of work is to design conveyance infrastructure to alleviate flooding for a susceptible portion of the City. Work will consist of engineering design and construction support for San Francisco Public Utilities Commission (SFPUC's) Folsom Area Stormwater Improvement Project. This includes up to 4,000 linear feet of approximately 12' inside diameter tunnel from Alameda and Treat Streets to approximately 7th and Berry Streets, launching and receiving shafts, and all related site investigation work (e.g., geotechnical and hazardous material).

- B. Explain why this service is necessary and the consequence of denial:

  The neighborhood surrounding 17th, 18th, and Folsom Streets has been historically subject to flooding during moderate to heavy storms. The design of this project is part of Sewer System Improvement Program (SSIP) Phase 1 to advance the City's goal of managing stormwater and minimizing flooding in the City's design storm. Design and construction of conveyance infrastructure protection is needed to alleviate flooding for a susceptible portion of the City and without this project, the 17th, 18th and Folsom Street areas will remain vulnerable to flooding.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 49868 17/18
- D. Will the contract(s) be renewed? No.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
  Modification No. 1 to PSC 49868-17/18 is requested to authorize a five-year term from November 1, 2018 through November 1, 2023 for SFPUC Agreement No. PRO.0101, Tunnel Engineering

Services for the Folsom Area Stormwater Improvement Project. A five-year term is needed to explore alternatives and possible redesign of the tunnel due to unforeseen site conditions. The PSC duration of five years and thirteen weeks exceeds the contract duration because the PSC term begins three months before the contract term.

# 2. Reason(s) for the Request

A. Display all that apply

✓ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

#### Explain the qualifying circumstances:

Design and construction of tunnels occurs infrequently and there is no continuous, long-term workload for this specialized service, nor is such expertise available from within City resources.

## B. Reason for the request for modification:

Modification No. 1 to PSC 49868-17/18 is requested to add \$4,000,000 and three years to SFPUC Contract PRO.0101 Tunnel Engineering Services for the Folsom Area Stormwater Improvement Project to provide a redesign of the tunnel alignment due to unforeseen site conditions. After Modification No. 1 PSC 49868-17/18 will have the same \$9,700,000 contract amount and 5-year term as SFPUC Contract PRO.0101.

## 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Highly specialized expertise is required to assist City staff to provide engineering design services for a large diameter sewer tunnel in Seismic Zone 4, including associated comprehensive geotechnical and hazardous material investigations and advanced numerical modeling.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2; 5602, Utility Specialist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, drilling equipment for geotechnical/hazardous material investigation will be required.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

Design and construction of tunnels occurs infrequently. There is no reliably continuous, long-term workload for this service, which renders the hiring of long-term City employees unviable. Note that this project will be jointly performed by both City staff (SFPW & SFPUC) in areas of the project where these departments are qualified to engage, and the consultant team for the design work specific to the tunnel portion of the project.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, there is insufficient continuous, long term workload to support a long-term staff of tunnel designers.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - To foster the transfer of technical expertise relevant to tunnel design and construction to City staff, this contract will include provisions for approximately 40 hours of consultant-led, in-office training sessions at the SFPUC. While training topics will be determined jointly with SFPUC during the Design Phase, potential topics may include: tunnel safety, maintenance and rehabilitation strategies for tunnels, construction management of tunnel projects, pipeline fault crossing design, retrofitting of portals and pipelines for seismic hazards, geotechnical considerations related to rock or mixed soil tunnel design, tunnel lining design, tunneling methodology and shaft construction, alternative tunnel portal designs. Training will be relevant but not limited to: civil engineers, mechanical engineers, geotechnical engineers, structural engineers, construction managers, and project managers.
- C. Are there legal mandates requiring the use of contractual services? No.
- Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>08/07/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Bill Irwin</u> Phone: <u>415-934-3975</u> Email: <u>wirwin@sfwater.org</u>

Address: 525 Golden Gate Avenue, 8th Floor, San Francisco, CA 94102

\*

# FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>49868 - 17/18</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>wirwin@sfwater.org</u>

To: <u>Irwin, William; amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com;</u>

wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)

Subject: Receipt of Modification Request to PSC # 49868 - 17/18 - MODIFICATIONS

**Date:** Friday, August 7, 2020 2:15:59 PM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for

a Personal Services Contract (PSC) for \$2,700,000 for services for the period August 1, 2020 – November 1, 2023. For all Modification requests, there is

7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the

initial PSC and the cumulative amount of the request is over \$100,000, there

1S

a 60 day review period for SEIU

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/15373

Email sent to the following addresses: L21PSCReview@ifpte21.org pkim@ifpte21.org eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ecassidy@ifpte21.com amakayan@ifpte21.org

# Additional Attachment(s)

# PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION PUC			Dept. Code: PUC				
Type of Request:	☑Initial	□Modifica	tion of an exis	sting PSC (PSC #	)		
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)		
Type of Service: Tunnel Eng	ineering Desig	n (PRO.0101	)				
Funding Source: SSIP Funde	<u>ed</u>		PSC	Duration: 2 years	s 1 day		
PSC Amount: \$7,000,000							
A. Scope of Work/Service The primary scope of work portion of the City. Work Public Utilities Commission 4,000 linear feet of approapproximately 7th and Best (e.g., geotechnical and has B. Explain why this service	rk is to design of will consist of on (SFPUC's) Fookimately 12' in erry Streets, lacazardous mater	conveyance i engineering olsom Area S nside diamet unching and rial).	design and co tormwater Im er tunnel from receiving shaf	nstruction support provement Project n Alameda and Trea fts, and all related s	: for San Francisco t. This includes up to at Streets to		
The neighborhood surrouduring moderate to heav (SSIP) Phase 1 to advance design storm. Design and flooding for a susceptible areas will remain vulnera	unding 17th, 18 y storms. The o the City's goal construction o portion of the	oth, and Folso design of this I of managin of conveyand City and wit	om Streets ha s project is par g stormwater ce infrastructu	s been historically s it of Sewer System and minimizing flo re protection is ne	Improvement Program oding in the City's eded to alleviate		
C. Has this service been p attach copy of the mo This service hasn't be	ost recently ap	proved PSC.	how? If the se	rvice was providec	l under a previous PSC,		
D. Will the contract(s) be No.	renewed?						
E. If this is a request for a PSC by another five you not applicable			ears, or if you	r request is to exte	nd (modify) an existing		
2. Reason(s) for the Reques  A. Indicate all that apply		d attach any	relevant supp	orting documents)	:		
☑ Short-term or capital p	rojects requirir	ng diverse sk	ills, expertise	and/or knowledge.			
B. Explain the qualifying ci Design and constructi for this specialized se	ion of tunnels o				us, long-term workload rces.		

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Highly specialized expertise is required to assist City staff to provide engineering design services for a large diameter sewer tunnel in Seismic Zone 4, including associated comprehensive geotechnical and hazardous material investigations and advanced numerical modeling.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2; 5602, Utility Specialist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, drilling equipment for geotechnical/hazardous material investigation will be required.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

SFPUC Engineering Management Bureau has reviewed the staffing plan and confirmed that such expertise is not available within current City resources. All related services that the City can provide -- such as design of smaller diameter tributary pipelines, geotechnical engineering, site assessment and remediation engineering, and hydraulic modeling -- will be performed by City resources, in collaboration with the consultant selected for this work.

### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  Design and construction of tunnels occurs infrequently. There is no reliably continuous, long-term workload for this service, which renders the hiring of long-term City employees unviable. Note that this project will be jointly performed by both City staff (SFPW & SFPUC) in areas of the project where these departments are qualified to engage, and the consultant team for the design work specific to the tunnel
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, there is insufficient continuous, long term workload to support a long-term staff of tunnel designers.

#### 6. Additional Information

portion of the project.

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - Yes. To foster the transfer of technical expertise relevant to tunnel design and construction to City staff, this contract will include provisions for approximately 40 hours of consultant-led, in-office training sessions at the SFPUC. While training topics will be determined jointly with SFPUC during the Design Phase, potential topics may include: tunnel safety, maintenance and rehabilitation strategies for tunnels, construction management of tunnel projects, pipeline fault crossing design, retrofitting of portals and pipelines for seismic hazards, geotechnical considerations related to rock or mixed soil tunnel design, tunnel lining design, tunneling methodology and shaft construction, alternative tunnel portal designs. Training will be relevant but not limited to: civil engineers, mechanical engineers, geotechnical engineers, structural engineers, construction managers, and project managers.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain. No.
- 7. <u>Union Notification</u>: On <u>12/27/2017</u>, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfwater.org

Address: 525 Golden Gate Avenue, 8th Floor San Francisco, CA 94102

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49868 - 17/18

DHR Analysis/Recommendation:
Commission Approval Required
03/05/2018 DHR Approved for 03/05/2018

action date: 03/05/2018

Approved by Civil Service Commission

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

epartment: <u>F</u>	OBLIC OTILITIES C	<u>OMMISSION</u>		Dept. (	Lode: PUC		
Type of Request:	□Initial	✓ Modification o	ion of an existing PSC (PSC # 44553 - 16/17)				
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)		
(PRO.0026,27,2		mprovement Progr	ram Constructio	n Management Serv	<u>ices</u>		
PSC Original Approved Amount: \$67,000,000			PSC Original Approved Duration: 03/01/17 - 11/01/25 (8 years 35 weeks)				
PSC Mod#1 Amount: \$25,000,000			PSC Mod#1 Duration: no duration added				
PSC Mod#2 Amount: \$7,000,000			PSC Mod#2 Duration: no duration added				
PSC Mod#3 Amount: \$10,000,000			PSC Mod#3 Duration: no duration added				
PSC Cumulative Amount Proposed: \$109,000,000			PSC Cumulativ weeks	e Duration Proposed	l: <u>8 years 35</u>		

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The San Francisco Public Utilities Commission (SFPUC) intends to award up to three (3) contracts ranging from \$15 million to \$35 million each to provide professional construction management (CM) services on an as-needed basis to support SFPUC staff on various Sewer System Improvement Program (SSIP) projects. These additional CM services will support existing staff on various SSIP projects including construction of the new headworks and biosolids digester facilities at the Southeast Water Pollution Control Plant (SEP) as well as major improvements and upgrades at other various wastewater treatment facilities. Additionally, as-needed CM staff may be required to support the SFPUC's Construction Management Bureau's organizational effort and may, for example, include adding on a short-term basis, Construction Engineer(s), Inspector(s), Safety Manager(s), and Cost Estimator(s).

- B. Explain why this service is necessary and the consequence of denial:
- The SFPUC does not have the staff resources to perform all of the required work nor could enough current staff be transferred from other City departments, e.g., SF Public Works. Additionally, no new hires could be added to meet the timing and/or requirements of the limited duration and specialized expertise for this proposed work effort. If denied, there would not be adequate staff and the necessary CM expertise to manage the construction of these projects, thus increasing the overall likelihood of inadequate performance on SSIP projects, which comprise a multi-billion dollar capital improvement program.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 44553 16/17
- D. Will the contract(s) be renewed? No.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The construction of the SSIP projects will span a time period of approximately eight (8) years and eight (8) months. This duration is due in large part to the sequencing of the construction work since the footprint for all of these construction projects is confined primarily to the wastewater treatment facilities located in San Francisco. In short, there is a large volume of construction work to be completed in a very small work area. Consequently, the as-needed CM services will be required throughout this entire construction duration.

#### 2. Reason(s) for the Request

A. Display all that apply

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

#### Explain the qualifying circumstances:

The work under this contract requires specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities.

#### B. Reason for the request for modification:

This PSC is related to SFPUC, Sewer System Improvement Program (SSIP), Construction Management Services. Under this PSC, four (4) contracts have been awarded, PRO.0027, PRO.0028, PRO.0068 and PRO.0104. The original award amount was \$67M, and to date, there have been two (2) modifications for a revised amount of \$99M. The following reflects the current approved amounts for the respective contracts: PRO.0027, Southeast Community Center @ 1550 Evans (\$5M) PRO.0028, New Headworks Facility Construction Management Staff Augmentation Services (\$17M) PRO.0068, Biosolids Digester Facility Construction Management Staff Augmentation Services (\$42M) PRO.0104, Southeast Plant Construction Managment Services (\$35M) Modification No.3 (\$10M) is being requested is related to PRO.0028, New Headworks Facility Construction Management Staff Augmentation Services. These services provide Construction Management (CM) services for a new 250 million gallons per day (MGD) Headworks facility at the Southeast Water Pollution Control Plant (SEP). The Headworks is the first treatment process in the liquid wastewater stream and contains the critical solids removal equipment such as the fine screens, grit removal, and odor control systems. Upgrading these systems will improve the downstream treatment. The CM services requested under this modification reflects the increased level of effort needed to support the project through final completion. The increased level of effort is due to changes in project scope and schedule. The increased level of effort is summarized below: • Addition of a Special Inspector to cover the Contractor's planned multiple work shifts. • Addition of an Office Engineer to assist with the multiple work scopes. • Addition of an Assistant Field Contract Administrator to support the increased CM/GC contract administration. • Addition of as-needed material testing services • Addition of inspector overtime based on the Contractor's planned multiple work shifts.

#### 3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Construction management skills include pre-construction services, contract administration, inspection services, contracts management, and project controls with expertise in the CM/GC project delivery method and in wastewater treatment facility construction including: contractor means and methods, safety regulations, water quality standards, system shutdowns and start-up procedures, equipment and performance testing, compliance with latest building codes, and claims expertise. These specialized skills and knowledge are essential for

- maintaining treatment plant operations and service to the customers during the overall SSIP construction period.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 6318, Construction Inspector; 6319, Senior Const Inspector;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

Current civil service classes are not applicable because they do not have the specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities, which are not the kind of projects these classes were set up to handle. Construction Engineers and Inspectors are needed to perform construction management work for SSIP projects, but this level of resources is not a long-term need that would warrant the hiring of new SFPUC personnel.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The specialized needs of construction management for SSIP projects, e.g., performance testing and start-up activities of wastewater treatment facilities, are not consistent or long enough in duration to make it feasible to adopt a new civil service class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

Training will not be provided. However, the SFPUC has previously used resources from SF Public Works to support the operation, maintenance, and repair of its existing wastewater treatment facilities. As such, the SFPUC and SF Public Works will continue to partner, but on a larger scale, by augmenting existing CM staff resources to meet the specialized needs and peak workload demands of the SSIP construction projects.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement. No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.

- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  HDR Engineering (PRO.0028)
- **7.** <u>Union Notification</u>: On <u>08/17/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

Address: 525 Golden Gate Avenue, 8th Floor, San Francisco, CA 94102

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44553 - 16/17

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>wirwin@sfwater.org</u>

To: <u>Irwin, William; amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com;</u>

wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org;

eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Jackson, Shamica; DHR-PSCCoordinator,

DHR (HRD)

Subject: Receipt of Modification Request to PSC # 44553 - 16/17 - MODIFICATIONS

**Date:** Monday, August 17, 2020 4:11:38 PM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request

for

a Personal Services Contract (PSC) for \$10,000,000 for services for the period

March 1, 2017 – November 1, 2025. For all Modification requests, there is

a

7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in

the

initial PSC and the cumulative amount of the request is over \$100,000, there

is

a 60 day review period for SEIU

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/10355

Email sent to the following addresses: L21PSCReview@ifpte21.org

pkim@ifpte21.org

eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org

tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com

ecassidy@ifpte21.com amakayan@ifpte21.org

# Additional Attachment(s)

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	nent: <u>PUBLIC UTILITIES COMMISSION</u> Dept. Code: <u>PUC</u>					
Type of Request:	□Initial	☑Modification	of an existing PSC	C (PSC # 44553 - 16,	/17)	
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Service: <u>Sewer System Improvement Program Construction Management Services</u> (PRO.0026,27,28,68,104) Funding Source: <u>SSIP Funded</u>						
PSC Original Approved Amount: \$67,000,000 PSC Original Approved Duration: 03/01/17 - 11/01/25 (8 years 35 weeks)						
PSC Mod#1 Amount: \$25,000,000 PSC Mod#1 Duration: no duration added						
PSC Mod#2 A	mount: <u>\$7,000,00</u>	<u>0</u>	PSC Mod#2 Duration: no duration added			
PSC Cumulati	ive Amount Propos	ed: <u>\$99,000,000</u>	PSC Cumulative Duration Proposed: 8 years 3! weeks			

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The San Francisco Public Utilities Commission (SFPUC) intends to award up to three (3) contracts ranging from \$15 million to \$35 million each to provide professional construction management (CM) services on an as-needed basis to support SFPUC staff on various Sewer System Improvement Program (SSIP) projects. These additional CM services will support existing staff on various SSIP projects including construction of the new headworks and biosolids digester facilities at the Southeast Water Pollution Control Plant (SEP) as well as major improvements and upgrades at other various wastewater treatment facilities. Additionally, as-needed CM staff may be required to support the SFPUC's Construction Management Bureau's organizational effort and may, for example, include adding on a short-term basis, Construction Engineer(s), Inspector(s), Safety Manager(s), and Cost Estimator(s).

B. Explain why this service is necessary and the consequence of denial:

The SFPUC does not have the staff resources to perform all of the required work nor could enough current staff be transferred from other City departments, e.g., SF Public Works. Additionally, no new hires could be added to meet the timing and/or requirements of the limited duration and specialized expertise for this proposed work effort. If denied, there would not be adequate staff and the necessary CM expertise to manage the construction of these projects, thus increasing the overall likelihood of inadequate performance on SSIP projects, which comprise a multi-billion dollar capital improvement program.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  - Services have been provided in the past through earlier PSC request. See 44553 16/17
- D. Will the contract(s) be renewed? No.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The construction of the SSIP projects will span a time period of approximately eight (8) years and eight (8) months. This duration is due in large part to the sequencing of the construction work since the footprint for all of these construction projects is confined primarily to the wastewater treatment facilities located in San Francisco. In short, there is a large volume of construction work to be completed in a very small work area. Consequently, the as-needed CM services will be required throughout this entire construction duration.

#### 2. Reason(s) for the Request

- A. Display all that apply
- ☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

#### Explain the qualifying circumstances:

The work under this contract requires specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities.

#### B. Reason for the request for modification:

Request to modify PSC #44553-16/17 by increasing the cost estimate for contract PRO.0068 Biosolids Digester Facilities CM Staff Augmentation Services by \$2,000,000 from \$40,000,000 to \$42,000,000, and by adding \$5,000,000 for contract PRO.0027 Southeast Community Center at 1550 Evans CM Staff Augmentation Services in order to provide SSIP-related construction management services for the construction of the new Southeast Community Center located in San Francisco's Bayview-Hunters Point neighborhood. PSC Mod #2 Amount: \$7,000,000 PSC Cumulative Amount Proposed: 99,000,000.

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Construction management skills include pre-construction services, contract administration, inspection services, contracts management, and project controls with expertise in the CM/GC project delivery method and in wastewater treatment facility construction including: contractor means and methods, safety regulations, water quality standards, system shutdowns and start-up procedures, equipment and performance testing, compliance with latest building codes, and claims expertise. These specialized skills and knowledge are essential for maintaining treatment plant operations and service to the customers during the overall SSIP construction period.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 6318, Construction Inspector; 6319, Senior Const Inspector;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - Current civil service classes are not applicable because they do not have the specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities, which are not the kind of projects these classes were set up to handle. Construction Engineers and Inspectors are needed to perform construction management work for SSIP projects, but this level of resources is not a long-term need that would warrant the hiring of new SFPUC personnel.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The specialized needs of construction management for SSIP projects, e.g., performance testing and start-up activities of wastewater treatment facilities, are not consistent or long enough in duration to make it feasible to adopt a new civil service class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - Training will not be provided. However, the SFPUC has previously used resources from SF Public Works to support the operation, maintenance, and repair of its existing wastewater treatment facilities. As such, the SFPUC and SF Public Works will continue to partner, but on a larger scale, by augmenting existing CM staff resources to meet the specialized needs and peak workload demands of the SSIP construction projects.
- C. Are there legal mandates requiring the use of contractual services? No.
- Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  HDR Engineering (PRO.0028)
- **7.** <u>Union Notification</u>: On <u>08/23/19</u>, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

Address: 525 Golden Gate Avenue, 8th Floor, San Francisco, CA 94102

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44553 - 16/17 DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 09/10/2019

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	t: <u>PUBLIC UTILITIES COMMISSION</u> Dept. Code: <u>PUC</u>							
Type of Request:	□Initial	✓Modification	of an existing PS	C (PSC # 44553 - 16,	/17)			
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)			
(PRO.0026,28	Type of Service: <u>Sewer System Improvement Program Construction Management Services</u> (PRO.0026,28,68,104) Funding Source: <u>SSIP Funded</u>							
PSC Original Approved Amount: \$67,000,000 PSC Original Approved Duration: 03/01/17 - 11/01/25 (8 years 35 weeks)								
PSC Mod#1 Amount: \$25,000,000 PSC Mod#1 Duration: no duration added								
PSC Cumulative Amount Proposed: \$92,000,000 PSC Cumulative Duration Proposed: 8 years 39 weeks					l: <u>8 years 35</u>			

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The San Francisco Public Utilities Commission (SFPUC) intends to award up to three (3) contracts ranging from \$15 million to \$35 million each to provide professional construction management (CM) services on an as-needed basis to support SFPUC staff on various Sewer System Improvement Program (SSIP) projects. These additional CM services will support existing staff on various SSIP projects including construction of the new headworks and biosolids digester facilities at the Southeast Water Pollution Control Plant (SEP) as well as major improvements and upgrades at other various wastewater treatment facilities. Additionally, as-needed CM staff may be required to support the SFPUC's Construction Management Bureau's organizational effort and may, for example, include adding on a short-term basis, Construction Engineer(s), Inspector(s), Safety Manager(s), and Cost Estimator(s).

- B. Explain why this service is necessary and the consequence of denial:
- The SFPUC does not have the staff resources to perform all of the required work nor could enough current staff be transferred from other City departments, e.g., SF Public Works. Additionally, no new hires could be added to meet the timing and/or requirements of the limited duration and specialized expertise for this proposed work effort. If denied, there would not be adequate staff and the necessary CM expertise to manage the construction of these projects, thus increasing the overall likelihood of inadequate performance on SSIP projects, which comprise a multi-billion dollar capital improvement program.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  - The services required for SSIP projects have not been performed on this scale in the past. There is more work than can be performed by in-house SFPUC personnel. Additionally, there is specialized CM experience and expertise required that is not available within City forces, i.e., experience and expertise with wastewater treatment facility construction and the implementation and operationalization a Construction Manager/General Contractor (CM/GC) project delivery method.

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The construction of the SSIP projects will span a time period of approximately eight (8) years and eight (8) months. This duration is due in large part to the sequencing of the construction work since the footprint for all of these construction projects is confined primarily to the wastewater treatment facilities located in San Francisco. In short, there is a large volume of construction work to be completed in a very small work area. Consequently, the as-needed CM services will be required throughout this entire construction duration.

#### 2. Reason(s) for the Request

A. Display all that apply

☑ Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Explain the qualifying circumstances:

The work under this contract requires specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities.

B. Reason for the request for modification:

To align the PSC amount with the Contract amounts.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Construction management skills include pre-construction services, contract administration, inspection services, contracts management, and project controls with expertise in the CM/GC project delivery method and in wastewater treatment facility construction including: contractor means and methods, safety regulations, water quality standards, system shutdowns and start-up procedures, equipment and performance testing, compliance with latest building codes, and claims expertise. These specialized skills and knowledge are essential for maintaining treatment plant operations and service to the customers during the overall SSIP construction period.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 6318, Construction Inspector; 6319, Senior Const Inspector;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

Current civil service classes are not applicable because they do not have the specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities, which are not the kind of projects these classes were set up to handle.

Construction Engineers and Inspectors are needed to perform construction management work for SSIP projects, but this level of resources is not a long-term need that would warrant the hiring of new SFPUC personnel.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The specialized needs of construction management for SSIP projects, e.g., performance testing and start-up activities of wastewater treatment facilities, are not consistent or long enough in duration to make it feasible to adopt a new civil service class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

Training will not be provided. However, the SFPUC has previously used resources from SF Public Works to support the operation, maintenance, and repair of its existing wastewater treatment facilities. As such, the SFPUC and SF Public Works will continue to partner, but on a larger scale, by augmenting existing CM staff resources to meet the specialized needs and peak workload demands of the SSIP construction projects.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
   HDR Engineering (PRO.0028)
- **7.** <u>Union Notification</u>: On  $\underline{11/14/17}$ , the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfwater.org

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44553 - 16/17 DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 11/22/2017

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION PUC Dept. Code: PUC					ode: <u>PUC</u>	
Type of Request:	☑Initial	☐ Modification of an existing PSC (PSC #)				
Type of Approval:	$\square$ Expedited	☑Regular	$\square$ Annual	$\Box$ Continuing	☐ (Omit Posting)	
Type of Service: Sewer System Improvement Program Construction Management Services  (PRO.0026,27,28,68,104)  Funding Source: SSIP Funded PSC Duration: 8 years 35 weeks						
PSC Amount: \$67,000,000						

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The San Francisco Public Utilities Commission (SFPUC) intends to award up to three (3) contracts ranging from \$15 million to \$35 million each to provide professional construction management (CM) services on an as-needed basis to support SFPUC staff on various Sewer System Improvement Program (SSIP) projects. These additional CM services will support existing staff on various SSIP projects including construction of the new headworks and biosolids digester facilities at the Southeast Water Pollution Control Plant (SEP) as well as major improvements and upgrades at other various wastewater treatment facilities. Additionally, asneeded CM staff may be required to support the SFPUC's Construction Management Bureau's organizational effort and may, for example, include adding on a short-term basis, Construction Engineer(s), Inspector(s), Safety Manager(s), and Cost Estimator(s).

- B. Explain why this service is necessary and the consequence of denial:
- The SFPUC does not have the staff resources to perform all of the required work nor could enough current staff be transferred from other City departments, e.g., SF Public Works. Additionally, no new hires could be added to meet the timing and/or requirements of the limited duration and specialized expertise for this proposed work effort. If denied, there would not be adequate staff and the necessary CM expertise to manage the construction of these projects, thus increasing the overall likelihood of inadequate performance on SSIP projects, which comprise a multi-billion dollar capital improvement program.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  The services required for SSIP projects have not been performed on this scale in the past. There is more work than can be performed by in-house SFPUC personnel. Additionally, there is specialized CM experience and expertise required that is not available within City forces, i.e., experience and expertise
  - with wastewater treatment facility construction and the implementation and operationalization a Construction Manager/General Contractor (CM/GC) project delivery method.
- D. Will the contract(s) be renewed? No.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.

The construction of the SSIP projects will span a time period of approximately eight (8) years and eight (8) months. This duration is due in large part to the sequencing of the construction work since the footprint for all of these construction projects is confined primarily to the wastewater treatment facilities located in San Francisco. In short, there is a large volume of construction work to be completed in a very small work area. Consequently, the as-needed CM services will be required throughout this entire construction duration.

#### 2. Reason(s) for the Request

- A. Indicate all that apply (be specific and attach any relevant supporting documents):
- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- B. Explain the qualifying circumstances:

The work under this contract requires specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities.

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Construction management skills include pre-construction services, contract administration, inspection services, contracts management, and project controls with expertise in the CM/GC project delivery method and in wastewater treatment facility construction including: contractor means and methods, safety regulations, water quality standards, system shutdowns and start-up procedures, equipment and performance testing, compliance with latest building codes, and claims expertise. These specialized skills and knowledge are essential for maintaining treatment plant operations and service to the customers during the overall SSIP construction period.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 6318, Construction Inspector; 6319, Senior Const Inspector;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources</u> within the City?

The SFPUC has previously used resources from SF Public Works to support the operation, maintenance, and repair of its existing wastewater treatment facilities. As such, the SFPUC and SF Public Works will continue to partner, but on a larger scale, by augmenting existing CM staff resources to meet the specialized needs and peak workload demands of the SSIP construction projects.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

Current civil service classes are not applicable because they do not have the specialized experience and knowledge to adequately manage the construction associated with large, complex wastewater treatment facilities, which are not the kind of projects these classes were set up to handle. Construction Engineers and Inspectors are needed to perform construction management work for SSIP projects, but this level of resources is not a long-term need that would warrant the hiring of new SFPUC personnel.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. The specialized needs of construction management for SSIP projects, e.g., performance testing and start-up activities of wastewater treatment facilities, are not consistent or long enough in duration to make it feasible to adopt a new civil service class.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. No. Training will not be provided. However, the SFPUC has previously used resources from SF Public Works to support the operation, maintenance, and repair of its existing wastewater treatment facilities. As such, the SFPUC and SF Public Works will continue to partner, but on a larger scale, by augmenting existing CM staff resources to meet the specialized needs and peak workload demands of the SSIP construction projects.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>08/22/2016</u>, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfwater.org

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44553 - 16/17

DHR Analysis/Recommendation: action date: 10/17/2016

Commission Approval Required Approved by Civil Service Commission

10/17/2016 DHR Approved for 10/17/2016

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: P	UBLIC HEALTH		Dept. Code: <u>DPH</u>				
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 46323 - 16/17)					
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)		
Type of Service	: Medical Labora	tory Testing Servi	<u>ces</u>				
Funding Source: General Funds							
PSC Original Approved Amount: \$500,000 PSC Original Approved Duration: 10/01/16 - 09/30/20 (4 years)					<u>0/01/16 -</u>		
PSC Mod#1 Amount: \$200,000 PSC Mod#1 Duration: 11/26/18-06/30/22 (1 year 3 weeks)							
PSC Mod#2 Amount: \$30,000,000 PSC Mod#2 Duration: 07/20/20-12/31 weeks)					2/31/25 (3 years 26		
PSC Cumulative Amount Proposed: \$30,700,000 PSC Cumulative Duration Proposed: 9 years 13 weeks							

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The contractor will perform as-needed laboratory services for urinalysis testing for the San Francisco Department of Public Health Psychiatry Division's Office-Based Opioid Treatment (OBOT) Section, to include the Standard Test Panel certified by the State of California Health and Human Services Agency, Department of Health Services. Toxicology tests will include screening urine samples for the following toxins: Phenobarbital, Secobarbital, Pentobarbital, Butalbital, Morphine, Codeine, Hydrocodone, Hydromorphine, 6-Acetylmorphine, Amphetamine, Methamphetamine, Methadone, Methadone Metabolite, Cocaine and Benzodiazepine.

#### **Scope Change**

In order to respond to the COVID-19 pandemic, the scope of the services will change to add laboratory services for COVID-19 testing, as well as other diagnostic tests which may be needed intermittently if the Department's laboratory services are required to focus chiefly on COVID-19 testing to meet surge demands. The previously approved specialized opioid testing services will continue.

- B. Explain why this service is necessary and the consequence of denial:
- The services are necessary in order for the Department to continue effective delivery of substance abuse services to clients of the Department of Public Health. Denial will impact program effectiveness and decrease the quality of outcomes.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
  - Services have been provided in the past through earlier PSC request. See 46323 16/17

D. Will the contract(s) be renewed? If there is a continued need.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The requested PSC modification extends the PSC by 3 years. In order to respond to the evolving nature of the pandemic, the Department anticipates a continued need for support of its laboratory services in order to provide adequate COVID-19 testing. The Department also will continue to have a need for OBOT low volume and intermittent specialized testing services, since the Department does not have a fully equipped and licensed laboratory to perform the specialized opioid tests within regulatory guidelines.

#### 2. Reason(s) for the Request

- A. Display all that apply
- ☑ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

For opioid testing, due to the relatively low volume and specialized nature of the tests it is not practical to assume the testing function in-house. For COVID-19 testing, the sudden and uncertain nature of the pandemic has created peak workloads and demands for resources that the City lacks, since the Department does not have a laboratory which is able to handle this unprecedented situation within clinically appropriate and regulatory requirements, and it anticipates the need to provide an immediate response for the near future.

B. Reason for the request for modification:

In response to the Local Emergency declared on February 25, 2020 the Department implemented a comprehensive testing program for COVID-19. In order to meet the unprecedented volume of COVID-19 tests the Department has needed to supplement in-house testing capacity with outside laboratory services. This modification reflects the ongoing need to continue COVID-19 testing and for additional follow-on testing in support of ongoing efforts to respond to the COVID-19 pandemic. The PSC will continue to support specialized opioid testing, and add other diagnostic tests that may be needed as in-house capacity may switch to COVID-19 testing on as needed basis to accommodate surges.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: The contractor must have have at least five years of experience providing the requested testing services; Contractor must have a commercial laboratory and all related equipment to provide such testing; Contractor must have an effective method to accept samples through the US Mail and must provide the results within the specified turnaround time in a manner specified by the City; Contractor must have trained personnel to perform the services.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2462, Microbiologist; 2464, Senior Microbiologist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide a fully equipped and licensed laboratory to perform the requested tests.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

For opioid testing, the Public Health Laboratory is not equipped to perform the requested low volume of intermittent, as-needed urinalysis services. For COVID-19 testing, the Public Health Laboratory is not equipped to perform the high volume of tests needed to respond to the pandemic to insure appropriate response to a highly contagious and dangerous virus.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: For opioid testing, due to the relatively low volume and specialized nature of the tests it is not practical to adopt a new civil service class for this work. For COVID-19 testing, it is not practical to adopt a new class for this work, as classifications which perform the work already exist.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training will be provided. Training is not part of the purpose of the services needed.

- C. Are there legal mandates requiring the use of contractual services? No.
- Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
  No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain. Lab Corp
- **7.** <u>Union Notification</u>: On <u>07/23/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

Teamsters, Local 856 Health Workers;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Jacquie Hale</u> Phone: <u>(415) 554-2609</u> Email: <u>jacquie.hale@sfdph.org</u>

Address: 1380 Howard Street, Room 421b, San Francisco, CA 94103

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46323 - 16/17

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

#### Hale, Jacquie (DPH)

From: Hale, Jacquie (DPH)

**Sent:** Thursday, July 23, 2020 1:59 PM

**To:** pfinn@ibt856.org

**Cc:** DHR-PSCCoordinator, DHR (HRD); Longhitano, Robert (DPH) **Subject:** Modification Request to PSC # 46323 - 16/17 - MODIFICATIONS

**Attachments:** 46323 - 1617 Mod 2 Union Notified 7-23-20.pdf

Tracking: Recipient Delivery

pfinn@ibt856.org

DHR-PSCCoordinator, DHR (HRD)

Delivered: 7/23/2020 1:59 PM

Longhitano, Robert (DPH)

Delivered: 7/23/2020 1:59 PM

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$30,000,000 for services for the period July 20, 2020 – December 31, 2025.

For all Modification requests, there is a 7-Day notice to the union(s) prior to DHR Review.

After logging into the system please select link below:

http://apps.sfgov.org/dhrdrupal/node/12222

Email sent to the following addresses: <a href="mailto:pfinn@ibt856.org">pfinn@ibt856.org</a>; <a href="mailto:jlanthier@ibt856.org">jlanthier@ibt856.org</a>; <a href="mailto:jlanthier@ibt85

# Additional Attachment(s)

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	PUBLIC HEALTH			Dept. 0	Code: <u>DPH</u>		
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 46323 - 16/17)					
Type of Approval:	□Expedited	☑Regular	□Annual	$\square$ Continuing	☐ (Omit Posting)		
Type of Servi	ce: <u>Medical Labo</u>	ratory Testing Se	<u>ervices</u>				
Funding Source: General Funds							
PSC Original Approved Amount: \$500,000 PSC Original Approved Duration: 10/01/16 - 09/30/20 (4 years)							
PSC Mod#1 Amount: \$200,000 PSC Mod#1 Duration: 11/26/18-06/30/22 (1 year 39 weeks)							
PSC Cumulat	PSC Cumulative Amount Proposed: \$700,000 PSC Cumulative Duration Proposed: 5 years 39 weeks						

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The contractor will perform as-needed laboratory services for urinalysis testing for the San Francisco Department of Public Health Psychiatry Division's Office-Based Opioid Treatment (OBOT) Section, to include the Standard Test Panel certified by the State of California Health and Human Services Agency, Department of Health Services. Toxicology tests will include screening urine samples for the following toxins: Phenobarbital, Secobarbital, Pentobarbital, Butalbital, Morphine, Codeine, Hydrocodone, Hydromorphine, 6-Acetylmorphine, Amphetamine, Methamphetamine, Methadone, Methadone Metabolite, Cocaine and Benzodiazepine.

- B. Explain why this service is necessary and the consequence of denial:

  The services are necessary in order for the Department to continue effective delivery of substance abuse services to clients of the Department of Public Health. Denial will impact program effectiveness and decrease the quality of outcomes.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 46323 16/17
- D. Will the contract(s) be renewed? If there is a continued need.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
  The requested administrative approval will extend the PSC by 21 months. The Department will continue to have a need for the low volume and intermittent specialized testing service because the Department does not have a fully equipped and licensed laboratory to perform the requested tests within the required regulatory guidelines.

#### 2. Reason(s) for the Request

- A. Display all that apply
- ☑ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

#### Explain the qualifying circumstances:

Due to the relatively low volume and specialized nature of the tests it is not practical to assume the testing function in-house.

#### B. Reason for the request for modification:

The modification will clarify the list of tests that the contractor will perform to include Fentanyl which is an opioid, and the Department has an immediate need to test for on a regular basis. In addition, the requested administrative approval will also extend the term of the PSC by 21 month through June 30, 2022.

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contractor must have have at least five years of experience providing the requested testing services; Contractor must have a commercial laboratory and all related equipment to provide such testing; Contractor must have an effective method to accept samples through the US Mail and must provide the results within the specified turnaround time in a manner specified by the City; Contractor must have trained personnel to perform the services.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2462, Microbiologist; 2464, Senior Microbiologist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide a fully equipped and licensed laboratory to perform the requested tests.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - At the present time the Public Health Laboratory is not equipped to perform the requested low volume of intermittent, as-needed urinalysis services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Due to the relatively low volume and specialized nature of the tests it is not practical to adopt a new civil service class for this work.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training will be provided. Training is not part of the purpose of the services needed.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
   No.
- **7.** <u>Union Notification</u>: On <u>11/26/18</u>, the Department notified the following employee organizations of this PSC/RFP request:

Teamsters, Local 856 Health Workers;

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46323 - 16/17

DHR Analysis/Recommendation:
Commission Approval Not Required
Approved by DHR on 02/07/2019

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEA		Dept. Code: <u>DPH</u>						
Type of Request:	☑Initial	☐ Modification of an existing PSC (PSC #)						
Type of Approval:	□Expedited	<b>☑</b> Regular	$\square$ Annual	☐ Continuing	☐ (Omit Posting)			
Type of Service: Medical	Laboratory Tes	ting Services	<u>.</u>					
Funding Source: General	Funding Source: General Funds PSC Duration: 4 years							
PSC Amount: <u>\$500,000</u>								
<ol> <li>Description of Work         <ul> <li>A. Scope of Work/Service</li> <li>The contractor will perform to Public Health Standard Telepartment of Health Stoxins: Phenobarbital, Phenobarbital, Stoxins: Phenobarbital, Phenobarbi</li></ul></li></ol>	form as-neede lealth Psychiat est Panel certif Services. Toxico Secobarbital, P ylmorphine, Ai	d laboratory ry Division's ied by the St blogy tests w entobarbital mphetamine	Office-Based O ate of Californi ill include scre , Butalbital, Mo	pioid Treatment ( ia Health and Hum ening urine sampl orphine, Codeine,	OBOT) Section, to nan Services Agency, es for the following Hydrocodone,			
The services are necess services to clients of the	B. Explain why this service is necessary and the consequence of denial:  The services are necessary in order for the Department to continue effective delivery of substance abuse services to clients of the Department of Public Health. Denial will impact program effectiveness and decrease the quality of outcomes.							
C. Has this service been PSC, attach copy of This service was per Administration.	the most rece	ntly approve	d PSC.					
D. Will the contract(s) b If there is a continued r								
E. If this is a request for existing PSC by anonotapplicable				ur request is to ex	tend (modify) an			
2. Reason(s) for the Requ  A. Indicate all that appl		ınd attach ar	ny relevant sup	porting document	ts):			
☑ Services required on	an as-needed,	intermittent	, or periodic ba	asis (e.g., peaks in	workload).			
$\square$ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).								

#### B. Explain the qualifying circumstances:

For opioid testing, due to the relatively low volume and specialized nature of the tests it is not practical to assume the testing function in-house. For COVID-19 testing, the sudden and uncertain nature of the pandemic has created peak workloads and demands for resources that the City lacks, since the Department does not have a laboratory which is able to handle this unprecedented situation within clinically appropriate and regulatory requirements, and it anticipates the need to provide an immediate response for the near future.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: The contractor must have have at least five years of experience providing the requested testing services; Contractor must have a commercial laboratory and all related equipment to provide such testing; Contractor must have an effective method to accept samples through the US Mail and must provide the results within the specified turnaround time in a manner specified by the City; Contractor must have trained personnel to perform the services.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2462, Microbiologist; 2464, Senior Microbiologist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide a fully equipped and licensed laboratory to perform the requested tests.

### 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.
  - For opioid testing, the Public Health Laboratory is not equipped to perform the requested low volume of intermittent, as-needed urinalysis services. For COVID-19 testing, the Public Health Laboratory is not equipped to perform the high volume of tests needed to respond to the pandemic to insure appropriate response to a highly contagious and dangerous virus.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. For opioid testing, due to the relatively low volume and specialized nature of the tests it is not practical to adopt a new civil service class for this work. For COVID-19 testing, it is not practical to adopt a new class for this work, as classifications which perform the work already exist.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
  - No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
  - No. No training will be provided. Training is not part of the purpose of the services needed.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.

  No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>10/19/2016</u>, the Department notified the following employee organizations of this PSC/RFP request:

Teamsters, Local 856 Health Workers

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: <u>Jacquie Hale</u> Phone: <u>(415) 554-2609</u> Email: <u>jacquie.hale@sfdph.org</u>

Address: 1380 Howard Street, Room 421b San Francisco, CA 94103

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46323 - 16/17

DHR Analysis/Recommendation: Commission Approval Required 02/06/2017 DHR Approved for 02/06/2017 action date: 02/06/2017
Approved by Civil Service Commission

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	ARTS COMMISSIO	TS COMMISSION			Dept. Code: <u>ART</u>		
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 33586 - 18/19)					
Type of Approval:	□Expedited	☑Regular	□Annual	$\square$ Continuing	☐ (Omit Posting)		
Type of Service: Market Management							
Funding Sou	rce: <u>General Fund</u>						
PSC Original Approved Amount: \$60,000 PSC Original Approved Duration: 08/15/18 - 02/15/19 (26 weeks 2 days)							
PSC Mod#1 Amount: \$140,000 PSC Mod#1 Duration: 02/16/19-06/30/20 (1 year 19 weeks)							
PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/20-06/30/21 (1 year)					5/30/21 (1 year)		
PSC Cumulative Amount Proposed: \$200,000 PSC Cumulative Duration Proposed: 2 years 45					: 2 years 45 weeks		

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

MJM Management group will perform on-site market management for the Embarcadero Plaza art market. They will act as a liaison between the Arts Commission and currently licensed artists, provide event management support between permitted events and artists, provide security and deescalation services for artists and other members of the public, and assist with the general set-up and take-down of the market on Friday, Saturday, and Sunday.

- B. Explain why this service is necessary and the consequence of denial:
- The Embarcadero Plaza is a multi-use site. Events, protests, tourists, commuters, art vendors, local businesses, and a high volume of people living on the street all share this space. Currently, there is no on-site management for the city's role here. It's a shared jurisdiction between Rec & Park, San Francisco Municipal Transit Authority, Department of Public Works, Boston Properties, the Port, and the Arts Commission. Multiple types of skills are needed to ensure smooth sailing at the market, and safety for public use. It is essential that a contractor with multiple skill areas be engaged. Without an effective on-site manager, the market will see an increasing number of safety, event, and street use service issues without designated oversight and the ability to be timely in the city's response.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Yes
- D. Will the contract(s) be renewed?

This current contract is for a trial run of six months. If found to be successful, the Arts Commission will look to renew the contract for a longer period of time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

#### 2. Reason(s) for the Request

- A. Display all that apply
- ☑ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).
- ☑ Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible (including situations where there is grant funding).

#### Explain the qualifying circumstances:

These services are only required on the weekend and as-needed depending on event permits. They require resources the city lacks, to be able to establish a temporary on-site location for doing business that is set-up and removed every day. Current funding for the art vendor program is tied to a program with dropping participation.

B. Reason for the request for modification:

The contract allows for three one year extensions. We are extending until June 30, 2021.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Language Access must be able to provide services in Spanish, Cantonese (Chinese and Mandarin), and Korean as needed. Deescalation Training must be familiar with deescalation and other city outreach services such as Homeless Outreach Team. Security must be able to provide trained security guards Market Administration event coordination, management of different entities and groups around permits physical logistics of the space Cash Handling must be able to take credit card and check payments Ability to set-up and take-down the temporary management space
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor may choose to bring a tent from which to conduct business. The Arts Commission will provide all necessary electronic equipment needed, but does not have the capacity or location on site to store a tent for the market.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

This is a part time, weekend contract for a variety of skills. As far as the Arts Commission knows, there are no civic service classes able to perform the work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It appears that the city has been contracting with management groups or granting out to event management nonprofits so as to cover the multiple skills of this work. Since that has been the process, it seems that it is not practical to adopt a new civil service class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

There won't be any training of city employees. The Arts Commission will train the contractor on the program needs.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Yes, MJM is the current contractor and they will continue.

**7.** <u>Union Notification</u>: On <u>06/11/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Kevin R. Quan Phone: 415-252-2230 Email: Kevin.r.quan@sfgov.org

Address: 401 Van Ness Ave, Ste 325, San Francisco, CA 94102

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#<u>33586 - 18/19</u>

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 **Civil Service Commission Action:** 

# **Receipt of Union Notification(s)**

#### Fw: Receipt of Modification Request to PSC # 33586 - 18/19 - MODIFICATIONS

Quan, Kevin (ART) < kevin.r.quan@sfgov.org>

Thu 6/11/2020 11:05 AM

To: Trickey, Anne (ART) <anne.trickey@sfgov.org>

FYI.

Kevin R. Quan

San Francisco Arts Commission 401 Van Ness Avenue, Suite 327 San Francisco, CA 94102 **T:** 415-252-2230 **F:** 415-934-1022 sfartscommission.org

e-Newsletter | Twitter | Facebook | YouTube | Flickr

**From:** dhr-psccoordinator@sfgov.org <dhr-psccoordinator@sfgov.org> on behalf of Kevin.r.quan@sfgov.org <Kevin.r.quan@sfgov.org>

Sent: Thursday, June 11, 2020 10:53 AM

To: Quan, Kevin (ART) < kevin.r.quan@sfgov.org>; Criss@SFMEA.com < Criss@SFMEA.com>; Meyers, Julie (HSA) <Julie.Meyers@sfgov.org>; seichenberger@local39.org <seichenberger@local39.org>; camaguey@sfmea.com (contact) < camaguey@sfmea.com>; ablood@cirseiu.org < ablood@cirseiu.org>; kcartermartinez@cirseiu.org <kcartermartinez@cirseiu.org>; ecassidy@ifpte21.com <ecassidy@ifpte21.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; wendywong26@yahoo.com <wendywong26@yahoo.com>; sarah.wilson@seiu1021.org <sarah.wilson@seiu1021.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; kpage@ifpte21.org <kpage@ifpte21.org>; tjenkins@uapd.com <tjenkins@uapd.com>; eerbach@ifpte21.org <eerbach@ifpte21.org>; tmathews@ifpte21.org <tmathews@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; jb@local16.org <jb@local16.org>; Ricardo.lopez@sfgov.org <Ricardo.lopez@sfgov.org>; Basconcillo, Katherine (PUC) <kbasconcillo@sfwater.org>; Sandeep.lal@seiu1021.me <Sandeep.lal@seiu1021.me>; pcamarillo seiu@sbcglobal.net <pcamarillo seiu@sbcglobal.net>; MRainsford@local39.org <MRainsford@local39.org>; Wendy.Frigillana@seiu1021.org < Wendy.Frigillana@seiu1021.org >; pscreview@seiu1021.org <pscreview@seiu1021.org>; pkim@ifpte21.org <pkim@ifpte21.org>; agonzalez@iam1414.org <agonzalez@iam1414.org>; ted.zarzecki@seiu1021.net <ted.zarzecki@seiu1021.net>; leah.berlanga@seiu1021.org <leah.berlanga@seiu1021.org>; gail@sffdlocal798.org <gail@sffdlocal798.org>; cityworker@sfcwu.org <cityworker@sfcwu.org>; davidmkersten@gmail.com <davidmkersten@gmail.com>; djohnson@opcmialocal300.org <djohnson@opcmialocal300.org>; ramonliuna261@gmail.comnet <ramonliuna261@gmail.comnet>; ablood@cirseiu.org <ablood@cirseiu.org>; pkarinen@nccrc.org <pkarinen@nccrc.org>; tony@dc16.us <tony@dc16.us>; stevek@bac3-ca.org <stevek@bac3-ca.org>; xiumin.li@seiu1021.org <xiumin.li@seiu1021.org>; Poon, Sin Yee (HSA) <sin.yee.poon@sfgov.org>; smcgarry@nccrc.org <smcgarry@nccrc.org>; rmitchell@twusf.org <rmitchell@twusf.org>; grojo@local39.org <grojo@local39.org>; jduritz@uapd.com <jduritz@uapd.com>; staff@SFMEA.com <staff@SFMEA.com>; mike@dc16.us <mike@dc16.us>; khughes@ibew6.org <khughes@ibew6.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; sfsmsa@gmail.com <sfsmsa@gmail.com>; mshelley@dc16.us <mshelley@dc16.us>; david.canham@seiu1021.org <david.canham@seiu1021.org>; jtanner940@aol.com <jtanner940@aol.com>; oashworth@ibew6.org <oashworth@ibew6.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; LiUNA.local261@gmail.com>;

local 200 twu@sbcglobal.net < local 200 twu@sbcglobal.net>; speedy 4864@aol.com < speedy 4864@aol.com>; Christina@SFMEA.com < Christina@SFMEA.com>; ecdemvoter@aol.com < ecdemvoter@aol.com>; thomas.vitale@seiu1021.org < thomas.vitale@seiu1021.org>; Trickey, Anne (ART) < anne.trickey@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) < dhr-psccoordinator@sfgov.org>

Subject: Receipt of Modification Request to PSC # 33586 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The ARTS COMMISSION -- ART has submitted a modification request for a Personal

Services Contract (PSC) for \$0 for services for the period July 1, 2020 – June

30, 2021. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the

initial PSC and the cumulative amount of the request is over \$100,000, there is

a 60 day review period for SEIU

After logging into the system please select link below:

thomas.vitale@seiu1021.org sarah.wilson@seiu1021.org

#### http://apps.sfgov.org/dhrdrupal/node/12300

Email sent to the following addresses: ecdemvoter@aol.com jtanner940@aol.com david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org xiumin.li@seiu1021.org ablood@cirseiu.org davidmkersten@gmail.com ted.zarzecki@seiu1021.net pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org pcamarillo\_seiu@sbcglobal.net Kbasconcillo@sfwater.org Ricardo.lopez@sfgov.org Julie.Meyers@sfgov.org leah.berlanga@seiu1021.org Sandeep.lal@seiu1021.me

# Additional Attachment(s)

### City and County of San Francisco Office of Contract Administration Purchasing Division

#### Second Amendment

THIS AMENDMENT (this "Amendment") is made as of **June 1, 2019**, in San Francisco, California, by and between **MJM Management Group** ("Contractor"), and the City and County of San Francisco, a municipal corporation ("City"), acting by and through its Director of the Office of Contract Administration.

#### Recitals

WHEREAS, City and Contractor have entered into the Agreement (as defined below); and

WHEREAS, City and Contractor desire to modify the Agreement on the terms and conditions set forth herein to extend the performance period and increase the contract amount; and

WHEREAS, the Agreement was competitively procured as required by San Francisco Administrative Code Chapter 21.1 through Request for Proposal ("RFP") issued on April 1, 2018 and this modification is consistent therewith; and

WHEREAS, approval for this Amendment was obtained when the Civil Service Commission approved Contract number PSC# 33586 - 18/19 on February 4, 2019;

NOW, THEREFORE, Contractor and the City agree as follows:

#### Article 1 Definitions

The following definitions shall apply to this Amendment:

1.1 Agreement. The term "Agreement" shall mean the Agreement dated June 29, 2018 between Contractor and City, as amended by the:

First amendment,

dated January 30, 2019, and

1.2 **Other Terms.** Terms used and not defined in this Amendment shall have the meanings assigned to such terms in the Agreement.

#### Article 2 Modifications to the Agreement.

The Agreement is hereby modified as follows:

- 2.1 **Definitions.** The following is hereby added to the Agreement as a Definition in Article 1:
- "Confidential Information" means confidential City information including, but not limited to, personally-identifiable information ("PII"), protected health information ("PHI"), or individual financial information (collectively, "Proprietary or Confidential Information") that is subject to local, state or federal laws restricting the use and disclosure of such information, including, but not limited to, Article 1, Section 1 of the California Constitution; the California Information Practices Act (Civil Code § 1798 et seq.); the California Confidentiality of Medical Information Act (Civil Code § 56 et seq.); the federal Gramm-Leach-Bliley Act (15 U.S.C. §§ 6801(b) and 6805(b)(2)); the privacy and information security aspects of the Administrative Simplification provisions of the federal Health Insurance Portability and Accountability Act (45 CFR Part 160 and Subparts A, C, and E of part 164); and San Francisco Administrative Code Chapter 12M (Chapter 12M).
- Notification of Legal Requests and Management of City Data and **Confidential Information** The following sections are hereby added and incorporated in Articles 11 and 13 of the Agreement:
- 11.14 Notification of Legal Requests. Contractor shall immediately notify City upon receipt of any subpoenas, service of process, litigation holds, discovery requests and other legal requests ("Legal Requests") related to all data given to Contractor by City in the performance of this Agreement ("City Data" or "Data"), or which in any way might reasonably require access to City's Data, and in no event later than 24 hours after it receives the request. Contractor shall not respond to Legal Requests related to City without first notifying City other than to notify the requestor that the information sought is potentially covered under a non-disclosure agreement. Contractor shall retain and preserve City Data in accordance with the City's instruction and requests, including, without limitation, any retention schedules and/or litigation hold orders provided by the City to Contractor, independent of where the City Data is stored.

#### **Management of City Data and Confidential Information**

- 13. 4.1 Access to City Data. City shall at all times have access to and control of all data given to Contractor by City in the performance of this Agreement ("City Data" or "Data"), and shall be able to retrieve it in a readable format, in electronic form and/or print, at any time, at no additional cost.
- 13.4.2 Use of City Data and Confidential Information. Contractor agrees to hold City's Confidential Information received from or created on behalf of the City in strictest confidence. Contractor shall not use or disclose City's Data or Confidential Information except as permitted or required by the Agreement or as otherwise authorized in writing by the City. Any work using, or sharing or storage of, City's Confidential Information outside the United States is subject to prior written authorization by the City. Access to City's Confidential Information must be strictly controlled and limited to Contractor's staff assigned to this project on a need-to-know basis only. Contractor is provided a limited non-exclusive license to use the City Data or Confidential Information solely for performing its obligations under the Agreement and not for Contractor's own purposes or later use. Nothing herein shall be construed to confer any license

or right to the City Data or Confidential Information, by implication, estoppel or otherwise, under copyright or other intellectual property rights, to any third-party. Unauthorized use of City Data or Confidential Information by Contractor, subcontractors or other third-parties is prohibited. For purpose of this requirement, the phrase "unauthorized use" means the data mining or processing of data, stored or transmitted by the service, for commercial purposes, advertising or advertising-related purposes, or for any purpose other than security or service delivery analysis that is not explicitly authorized.

- 13.4.3 **Disposition of Confidential Information**. Upon termination of Agreement or request of City, Contractor shall within forty-eight (48) hours return all Confidential Information which includes all original media. Once Contractor has received written confirmation from City that Confidential Information has been successfully transferred to City, Contractor shall within ten (10) business days purge all Confidential Information from its servers, any hosted environment Contractor has used in performance of this Agreement, work stations that were used to process the data or for production of the data, and any other work files stored by Contractor in whatever medium. Contractor shall provide City with written certification that such purge occurred within five (5) business days of the purge.
- 2.3 **Term of the Agreement.** Article 2 Term of the Agreement, Section 2.1 currently reads as follows:
  - 2.1 The term of this Agreement shall commence on the later of: (i) August 15, 2018; or (ii) the Effective Date and expire on June 30, 2019, unless earlier terminated as otherwise provided herein.

Such section is hereby amended in its entirety to read as follows:

- 2.1 The term of this Agreement shall commence on the later of: (i) August 15, 2018; or (ii) the Effective Date and expire on June 30, 2020, unless earlier terminated as otherwise provided herein.
- 2.4 **Payment.** Section 3.3.1 Payment of the Agreement currently reads as follows:
- 3.3.1 Payment. Contractor shall provide an invoice to the City on a monthly basis for Services completed in the immediate preceding month, unless a different schedule is set out in Appendix B, "Calculation of Charges." Compensation shall be made for Services identified in the invoice that the Director of Cultural Affairs, in his or her sole discretion, reasonably concludes has been satisfactorily performed. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists. In no event shall the amount of this Agreement exceed Eighty Thousand Dollars

(\$80,000). The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated by reference as though fully set forth herein. A portion of payment may be withheld until conclusion of the Agreement if agreed to by both parties as retainage, described in Appendix B. In no event shall City be liable for interest or late charges for any late payments.

Such section is hereby amended in its entirety to read as follows:

- 3.3.1 Payment. Contractor shall provide an invoice to the City on a monthly basis for Services completed in the immediate preceding month, unless a different schedule is set out in Appendix B, "Calculation of Charges." Compensation shall be made for Services identified in the invoice that the Director of Cultural Affairs, in his or her sole discretion, reasonably concludes has been satisfactorily performed. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists. In no event shall the amount of this Agreement exceed Two Hundred Thousand Dollars (\$200,000). The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated by reference as though fully set forth herein. A portion of payment may be withheld until conclusion of the Agreement if agreed to by both parties as retainage, described in Appendix B. In no event shall City be liable for interest or late charges for any late payments.
- 2.5 **Appendix B.** Appendix B is hereby replaced in its entirety by Appendix B-1, attached to this Amendment and fully incorporated within the Agreement.

#### Article 3 Effective Date

Each of the modifications set forth in Section 2 shall be effective on and after the date of this Amendment.

#### Article 4 Legal Effect

Except as expressly modified by this Amendment, all of the terms and conditions of the Agreement shall remain unchanged and in full force and effect.

IN WITNESS WHEREOF, Contractor and City have executed this Amendment as of the date first referenced above.

CITY Recommended by:  A blad of Man blagger  Tom DeCaigny  Director of Cultural Affairs  San Francisco Arts Commission
Approved as to Form:
Dennis J. Herrera City Attorney
Lauren Curry
Deputy City Attorney
Approved:
Alaric Degrafinried Director of the Office of Contract Administration, and Purchaser
By: Name:

CONTRACTOR

MJM Management Group

Andrew Bryant President

MJM Management Group

City supplier number: 0000015985

Attached Appendices: B-1

## Appendix B-1

### **Calculation of Charges**

No invoices for Services provided by law firms or attorneys, including, without limitation, as subcontractors of Contractor, will be paid unless the provider received advance written approval from the City Attorney.

Deliverable	Target Completion Dates	Cost
Manage the Embarcadero Arts Market	August 15, 2018 – June 30, 2020	
Provide a Facilities/Event Manager	August 15, 2018 – June 30, 2020	\$53,040 (1 person @ \$51 per hour x 1040 hours)
Provide onsite security personnel	August 15, 2018 – June 30, 2020	\$115,440 (2 people @ \$37 per hour x 3,120 hours)
Provide materials, equipment, supplies, and/or fees needed to manage Embarcadero Arts Market	August 15, 2018 – June 30, 2020	\$11,520
Admin/Indirect to cover program cost allocation @ 10%		\$20,000
Total Cost		\$200,000

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: <u>ARTS COMMISSION</u> Dept. Code: ART □Initial ✓ Modification of an existing PSC (PSC # 33586 - 18/19) Type of Request: ☐ Expedited □ Annual ☐ Continuing ☐ (Omit Type of **☑** Regular Approval: Posting) Type of Service: Market Management Funding Source: General Fund PSC Original Approved Amount: \$60,000 PSC Original Approved Duration: 08/15/18 -02/15/19 (26 weeks 2 days) PSC Mod#1 Amount: \$140,000 PSC Mod#1 Duration: 02/16/19-06/30/20 (1 year 19 weeks)

PSC Cumulative Amount Proposed: \$200,000 PSC Cumulative Duration Proposed: 1 year 45 weeks

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

MJM Management group will perform on-site market management for the Embarcadero Plaza art market. They will act as a liaison between the Arts Commission and currently licensed artists, provide event management support between permitted events and artists, provide security and deescalation services for artists and other members of the public, and assist with the general set-up and take-down of the market on Friday, Saturday, and Sunday.

#### **Scope Change**

The only change is the duration. Extending until June 2020.

B. Explain why this service is necessary and the consequence of denial:

The Embarcadero Plaza is a multi-use site. Events, protests, tourists, commuters, art vendors, local businesses, and a high volume of people living on the street all share this space. Currently, there is no on-site management for the city's role here. It's a shared jurisdiction between Rec & Park, San Francisco Municipal Transit Authority, Department of Public Works, Boston Properties, the Port, and the Arts Commission. Multiple types of skills are needed to ensure smooth sailing at the market, and safety for public use. It is essential that a contractor with multiple skill areas be engaged. Without an effective on-site manager, the market will see an increasing number of safety, event, and street use service issues without designated oversight and the ability to be timely in the city's response.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
Yes

#### D. Will the contract(s) be renewed?

This current contract is for a trial run of six months. If found to be successful, the Arts Commission will look to renew the contract for a longer period of time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

#### 2. Reason(s) for the Request

- A. Display all that apply
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).
- ☑ Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible (including situations where there is grant funding).

#### Explain the qualifying circumstances:

These services are only required on the weekend and as-needed depending on event permits. They require resources the city lacks, to be able to establish a temporary on-site location for doing business that is set-up and removed every day. Current funding for the art vendor program is tied to a program with dropping participation.

#### B. Reason for the request for modification:

The original start date of the contract was late. The Arts Commission is expanding this work with the current contractor until the end of June 2019. The Commission plans to continue this work until June 2020.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Language Access must be able to provide services in Spanish, Cantonese (Chinese and Mandarin), and Korean as needed. Deescalation Training must be familiar with deescalation and other city outreach services such as Homeless Outreach Team. Security must be able to provide trained security guards Market Administration event coordination, management of different entities and groups around permits physical logistics of the space Cash Handling must be able to take credit card and check payments Ability to set-up and take-down the temporary management space
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor may choose to bring a tent from which to conduct business. The Arts Commission will provide all necessary electronic equipment needed, but does not have the capacity or location on site to store a tent for the market.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

This is a part time, weekend contract for a variety of skills. As far as the Arts Commission knows, there are no civic service classes able to perform the work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It appears that the city has been contracting with management groups or granting out to event management nonprofits so as to cover the multiple skills of this work. Since that has been the process, it seems that it is not practical to adopt a new civil service class.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

There won't be any training of city employees. The Arts Commission will train the contractor on the program needs.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
  No.
- 7. <u>Union Notification</u>: On <u>12/12/18</u>, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Kevin R. Quan Phone: 415-252-2230 Email: Kevin.r.quan@sfgov.org

Address: 401 Van Ness Ave, Ste 325, San Francisco, CA 94102

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 33586 - 18/19

DHR Analysis/Recommendation: Commission Approval Required 02/04/2019 DHR Approved for 02/04/2019 02/04/2019 Approved by Civil Service Commission

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE Dept. Code: POL				Code: <u>POL</u>		
Type of Request:	□Initial	✓Modification	of an existing PSC	(PSC # 47260 - 14	/15)	
Type of Approval:	□Expedited	☑Regular	□Annual	☐ Continuing	☐ (Omit Posting)	
Type of Service: Pre-Employment Psychological Screening Services						
Funding Source: General Fund						
PSC Original Approved Amount: \$600,000			PSC Original Approved Duration: 07/01/15 - 06/30/19 (4 years)			
PSC Mod#1 Amount: \$300,000			PSC Mod#1 Duration: <u>07/01/19-06/29/21 (2 years)</u>			
PSC Mod#2 Ai	mount: <u>\$200,000</u>		PSC Mod#2 Durat day)	ion: <u>11/01/20-06</u>	5/30/22 (1 year 1	
PSC Cumulative Amount Proposed: \$1,100,000			PSC Cumulative Duration Proposed: 7 years 1 day			

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.

- B. Explain why this service is necessary and the consequence of denial:
- Pre-employment psychological evaluations of police officer candidates is required by section #1031(f) of the California Code of Regulations. Denial would prevent the San Francisco Police Department from hiring police officers.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 47260 14/15
- D. Will the contract(s) be renewed? unknown
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

  Pre-employment psychological screening services continue to be an essential part of the hiring

process of sworn applicants to ensure candidates are an appropriate fit for law enforcement.

#### 2. Reason(s) for the Request

- A. Display all that apply
- ✓ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Explain the qualifying circumstances:

Services required are on an as-needed, intermittent, or periodic basis when there is a police officer recruitment.

B. Reason for the request for modification:

#### 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Section #1031(f) of the California Code of Regulations requires a Ph.D. in Psychology with at least five (5) years of post-graduate experience in diagnosis and treatment of emotional and mental disorders.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the vendor will be required to have specialized software used for psychological evaluation and tracking of police officer candidates.

# 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  These services will be performed on an as-needed basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Services will be performed on an as-needed basis.

#### 6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No training is needed.

- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Contract will be extended and increase in value

**7.** <u>Union Notification</u>: On <u>07/16/20</u>, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 850 Bryant Street, #511, San Francisco, CA 94103

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47260 - 14/15

DHR Analysis/Recommendation: Commission Approval Required DHR Approved for 09/21/2020 Civil Service Commission Action:

# **Receipt of Union Notification(s)**

From: <u>dhr-psccoordinator@sfgov.org</u> on behalf of <u>Genie.Wong@sfgov.org</u>

To: Wong, Genie (POL); Criss@SFMEA.com; Meyers, Julie (HSA); seichenberger@local39.org; camaguey@sfmea.com

(contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org;

<u>Ricardo.lopez@sfgov.org</u>; <u>Basconcillo, Katherine (PUC)</u>; <u>Sandeep.lal@seiu1021.me</u>;

 $\underline{pcamarillo\ seiu@sbcglobal.net}, \underline{MRainsford@local39.org}, \underline{Wendy.Frigillana@seiu1021.org},$ 

pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.comnet; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; interval to the control of the control o

rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@SFMEA.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us;

david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@SFMEA.com;

ecdemvoter@aol.com; thomas.vitale@seiu1021.org; DHR-PSCCoordinator, DHR (HRD)

Subject: Receipt of Modification Request to PSC # 47260 - 14/15 - MODIFICATIONS

**Date:** Thursday, July 16, 2020 11:35:59 AM

#### PSC RECEIPT of Modification notification sent to Unions and DHR

The POLICE -- POL has submitted a modification request for a Personal Services

Contract (PSC) for \$200,000 for services for the period November 1, 2020 – June 30, 2022. For all Modification requests, there is a 7-Day noticed to the

union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the

initial PSC and the cumulative amount of the request is over \$100,000, there is

a 60 day review period for SEIU

After logging into the system please select link below:

#### http://apps.sfgov.org/dhrdrupal/node/12347

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present. Either you selected none or there is no email entered in the system by that particular union

# Additional Attachment(s)

#### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department:	POLICE			Dept. C	Code: <u>POL</u>
Type of Request:	□Initial	✓ Modification of an existing PSC (PSC # 47260 - 14/15)			
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	$\square$ Continuing	☐ (Omit Posting)
Type of Service: <u>Pre-Employment Psychological Screening Services</u>					
Funding Source: General Fund					
PSC Original Approved Amount: \$600,000		PSC Original Approved Duration: <u>07/01/15 - 06/30/19 (4 years)</u>			
PSC Mod#1 Amount: \$300,000 PSC Mod#1 Duration: <u>07/01/19-06/29/21 (2</u>			/29/21 (2 years)		
PSC Cumulative Amount Proposed: \$900,000 PSC Cumulative Duration Proposed: 6 years				: 6 vears	

#### 1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.

- B. Explain why this service is necessary and the consequence of denial:
- Pre-employment psychological evaluations of police officer candidates is required by section #1031 (f) of the California Code of Regulations. Denial would prevent the San Francisco Police Department from hiring police officers.
- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

  Services have been provided in the past through earlier PSC request. See 47260 14/15
- D. Will the contract(s) be renewed?
  unknown
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

#### 2. Reason(s) for the Request

- A. Display all that apply
- ✓ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Explain the qualifying circumstances:

Services required are on an as-needed, intermittent, or periodic basis when there is a police officer recruitment.

B. Reason for the request for modification:

The contractor will continue to provide the San Francisco Police Department (SFPD) with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures. This modification will allow the SFPD to extend the contract and increase contract value.

#### 3. <u>Description of Required Skills/Expertise</u>

- A. Specify required skills and/or expertise: Section #1031(f) of the California Code of Regulations requires a Ph.D. in Psychology with at least five (5) years of post-graduate experience in diagnosis and treatment of emotional and mental disorders.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the vendor will be required to have specialized software used for psychological evaluation and tracking of police officer candidates.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

Not Applicable

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  These services will be performed on an as-needed basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Services will be performed on an as-needed basis.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
  - No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

  No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Contract will be extended and increase in value

**7.** <u>Union Notification</u>: On <u>12/19/18</u>, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 850 Bryant Street, #511, San Francisco, CA 94103

\*

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47260 - 14/15 DHR Analysis/Recommendation: Commission Approval Not Required Approved by DHR on 02/20/2019

### PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE PC		Dept. Code: POL			
Type of Request:	☑Initial	☐Modification	of an existing PS	SC (PSC #	)
Type of Approval:	□Expedited	<b>☑</b> Regular	□Annual	☐ Continuing	☐ (Omit Posting)
Type of Service: Pre-Empl	oyment Psych	ological Screenin	g Services		
Funding Source: General F PSC Amount: \$600,000	<u>Fund</u>	PSC Est. Start Da	te: <u>07/01/2015</u>	PSC Est. End Date	e <u>06/30/2019</u>
<ol> <li>Description of Work         A. Scope of Work/Service         The vendor will provide police officer candidate     </li> </ol>	the San Franc	isco Police Depa			ons of final entry leve
<ul><li>B. Explain why this servi Pre-employment psychon California Code of Regu officers.</li></ul>	ological evalua	tions of police o	fficer candidates	•	
C. Has this service been attach copy of the n PSC 4139-07/08			w? If the service	was provided und	der a previous PSC,
D. Will the contract(s) be unknown	e renewed?				
E. If this is a request for PSC by another five not applicable		•	rs, or if your req	uest is to extend (	modify) an existing
2. Reason(s) for the Reque A. Indicate all that apply		ınd attach any re	levant supportin	g documents):	
☑ Services required on a	an as-needed,	intermittent, or	periodic basis (e.	g., peaks in worklo	oad).
B. Explain the qualifying Services required ar recruitment.			nt, or periodic ba	sis when there is a	a police officer
3. <u>Description of Required</u> A. Specify required skills Ph.D. in Psychology emotional and men	s and/or exper with at least f	tise: Section #1			gulations requires a sis and treatment of

B. Which, if any, civil service class(es) normally perform(s) this work? none

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the vendor will be required to have specialized software used for psychological evaluation and tracking of police officer candidates.

## 4. <u>If applicable, what efforts has the department made to obtain these services through available resources within the City?</u>

None because this is an as-needed.

#### 5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

- A. Explain why civil service classes are not applicable.

  These services will be performed on an as-needed basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Services will be performed on an as-needed basis.

#### 6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
- 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? If so, please explain and include an excerpt or copy of any such applicable requirement.
   No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action. No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

  No.
- **7.** <u>Union Notification</u>: On <u>09/23/2014</u>, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

☑ I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 850 Bryant Street, #511 San Francisco, CA 94103

#### FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47260 - 14/15

DHR Analysis/Recommendation: action date: 12/15/2014

Commission Approval Required Approved by Civil Service Commission with conditions

12/15/2014 DHR Approved for 12/15/2014