

City and County of San Francisco

London Breed
Mayor



Department of Human Resources

Carol Isen
Human Resources Director (Acting)

Date: January 15, 2021

To: The Honorable Civil Service Commission

Through: Carol Isen
Human Resources Director (Acting)

From: Cynthia Avakian, AIR
Joan Lubamersky, ADM / MYR
James Glik, CPC
Alexander Burns, DPW
Bill Irwin / Daniel Kwon, PUC
Sean McFadden, REC
Jacquie Hale, DPH
Ian Hart, HRD
Nicholas Chavez, JUV

Subject: **Personal Services Contracts Approval Request**

This report contains seventeen (17) 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
\$79,096,000	\$90,901,433	\$987,823,597

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POSTING FOR

February 01, 2021

PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
41964 - 20/21	AIRPORT COMMISSION	\$25,000,000.00	The proposed work involves the planning of airport facilities and resources to serve the core aviation business of San Francisco International Airport (SFO). Scopes of projects range from project-specific planning to integrated facilities master planning and report output, including, but not limited to: (1) aviation demand analysis, including forecasts of passengers, cargo, aircraft mix, (2) developing a comprehensive demand management program, (3) providing spatial and operational planning for passenger terminal facilities, (4) analyzing passenger, baggage, airfield, and ground access evaluations using simulation modeling, (5) updating the Airport Layout Plan, including assessing data needs and collecting and analyzing data according to Federal Aviation Administration (FAA) regulations, (6) providing planning support for on-Airport land use planning development, (7) providing planning support for the Airport Transportation System, (8) providing support in programmatic implementation concepts and plans, (9) conducting technical noise analysis in support of the Airport according to relevant federal and state regulations, and (10) assisting the advancement of highly specialized studies and provide support staff as may be required.	February 1, 2021	January 31, 2028	REGULAR
43624 - 20/21	AIRPORT COMMISSION	\$650,000.00	Contractor will provide a software system for the Airport to manage insurance compliance, and also provide data migration, testing, software support and maintenance services. As part of software support, contractor may also perform insurance compliance reviews for documents that cannot be processed by the software and provide customer support for SFO staff and contractors using the system.	March 1, 2021	September 30, 2028	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
41243 - 20/21	GENERAL SERVICES AGENCY - CITY ADMIN	\$250,000.00	Vendor will conduct an internal assessment of City Administrator/Administrative Services Divisions (ADM) staff's beliefs, attitudes, and practices and evaluate ADM's past and current projects through a racial equity lens. Vendor will provide summary of data that protects the identity of individuals who participated. Vendor will provide trainings and facilitate conversations around racial equity across ADM; help staff develop a vision for a more inclusive and equitable organizational culture; and build staff and organizational capacity to develop programs, policies, and practices that support and advance racial equity over time. Finally, vendor will help ADM staff develop a practical action plan that is measurable and actionable.	January 10, 2021	January 9, 2026	REGULAR
48666 - 20/21	CITY PLANNING	\$500,000.00	The San Francisco Planning Department is seeking to a Contractor to review and make recommendations regarding racial and social equity as they related to the department's regulatory review practices and codes, including extensive stakeholder engagement.	January 17, 2021	January 16, 2023	REGULAR
41062 - 20/21	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$4,000,000.00	Provide special construction and building materials inspection and testing services for the City's building, construction and renovation projects on an as-needed basis. The testing agencies will utilize certified staff to perform reinforced concrete, high strength bolting, structural steel welding, masonry, shotcrete, and spray-applied fireproofing inspection and testing services.	January 5, 2021	June 30, 2027	REGULAR
42862 - 20/21	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$9,000,000.00	Architectural services on an as-needed basis, for public building projects including but not limited to master plans, environmental reviews, programming and planning studies, assessments of existing facilities, green building evaluations, utility studies, design drawings, specifications, cost estimates, project schedules, adaptive re-use of existing facilities, modifications to life safety systems and other infrastructure, and new facilities.	December 1, 2020	June 30, 2027	REGULAR
44043 - 20/21	GENERAL SERVICES	\$3,000,000.00	Services are for financial consulting in facilities acquisition in conjunction with Mission Bay Development - Community	January 31, 2021	December 31, 2026	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
	AGENCY - PUBLIC WORKS		Facilities Districts Nos 4 & 6 (CFD #4 & #6). The Consultant's principal responsibilities will be to advise San Francisco Public Works (SFPW) on the interpretation of existing agreements with Developer, the determination of reimbursements, the settling of cost allocation and acquisition reimbursement protocols.			
44551 - 20/21	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$9,000,000.00	General services to assist the City in administering a Job Order Contracting (JOC) system as provided for in San Francisco Administrative Code Section 6.62 for use in expediting the design and construction of small and/or urgent projects. Service provider will prepare specialized Unit Price Books (construction cost catalog) with regional adjustments to costs for competitive bidding, technical specifications, provide proprietary JOC management software, and training to City staff and contractors in the use of a job order contracting system.	May 1, 2021	June 1, 2027	REGULAR
40415 - 20/21	MAYOR	\$600,000.00	The contractor will assist the Mayor's Office of Public Policy and Finance staff in making decisions on a wide variety of layout, content, design, and production issues related to the annual Mayor's Proposed Budget Book. As required by the City Charter, the Mayor introduces the proposed budget by June 1, and the Proposed Budget Book is published on the same day. The budget book ranges from 300 to 400 pages, detailing the Mayor's budget priorities, investments, and serves as a transparent policy document for the public and policymakers.	January 31, 2021	August 31, 2025	REGULAR
49703 - 20/21	PUBLIC UTILITIES COMMISSION	\$400,000.00	This work will include remote ergonomic assessments for individuals who are telecommuting and request an ergonomic evaluation. This work will include remote ergonomic assessments for individuals who are telecommuting and request an ergonomic evaluation. The assessments will include preparatory work with the individual, a videoconference where the ergonomic works one-on-one with the individual to adjust their workstation and determine if any additional solutions are needed (e.g. equipment from a list of approved ergonomic items SFPUC will provide), and then a written report afterwards	February 1, 2021	June 30, 2023	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			on the findings and recommendations. Assessments will include preparatory work with the individual, a videoconference where the ergonomic works one-on-one with the individual to adjust their workstation and determine if any additional solutions are needed (e.g. equipment from a list of approved ergonomic items SFPUC will provide), and then a written report afterwards on the findings and recommendations.			
44319 - 20/21	PUBLIC UTILITIES COMMISSION	\$400,000.00	An independent analysis and review of revenue, costs of service, and rates for the electric utilities under the jurisdiction of the San Francisco Public Utilities Commission (SFPUC). Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service based on their respective service requirements, and development of schedules of electric rates to recover allocated costs from each retail customer class.	January 15, 2020	January 14, 2022	REGULAR
41483 - 20/21	RECREATION AND PARK COMMISSION	\$320,000.00	Staff are needed to run zero waste sorting stations at Dolores park and provide education to park visitors on the weekends during the busy summer season. Park visitors interact with Eco-Pop Up staff by bringing their compost, recycling, and trash to the designated areas, where they are helped by Eco-Pop Up staff to sort their waste in the appropriate bins. Full compost & recycling totters are then emptied into large Recology debris boxes, to be serviced by Recology on a weekly basis. Waste diversion metrics are collected daily on the weekends to track usage and measure the season's overall waste diversion success.	April 1, 2021	April 1, 2025	REGULAR
43068 - 20/21	PUBLIC HEALTH	\$25,000,000.00	The Contractor(s) will provide services in support of an integrated system of Automated Dispensing Cabinets (ADC) for pharmaceuticals and related pharmacy technology, which includes optional automated pharmaceutical carousels and pharmaceutical packaging equipment. Services shall include equipment manufacture and delivery, design/build engineering and construction services for a complete installation, permits, system implementation,	February 1, 2021	January 31, 2030	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			end user training, equipment maintenance, software licensing and maintenance, full integration with the Department of Public Health's (DPH's) electronic health record system and other clinical applications, consulting services, and other services required to keep the system and leased equipment in good repair and fully functional. The design/build portion of the total contract is estimated at \$3.2 million, of which 15% is design and 85% is build.			
44328 - 20/21	GENERAL SERVICES AGENCY - CITY ADMIN	\$800,000.00	The Contractor(s) will provide as-needed and scheduled maintenance, warranty, and intermittent repair services on City-owned specialty vehicles and equipment. The Contractor(s) is the Manufacturer(s) exclusive and sole service distributor within its assigned territories including the City and County of San Francisco. The Contractor is to offer OEM parts and manufacturer-certified and -trained authorized technicians to provide required services for specialty brand machinery.	January 4, 2021	January 3, 2026	REGULAR

TOTAL AMOUNT \$78,920,000

Published on *Personal Services Request Database* (<http://apps.sfgov.org/dhrdrupal>)[Home >](#)

Posting For February 01, 2021

Proposed Modifications to Personal Services Contracts

Commission Hearing Date

APPLY

2021-02-01

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
37308 - 17/18 - MODIFICATIONS	February 1, 2021	GENERAL SERVICES AGENCY - CITY ADMIN -- ADM	\$96,000	\$175,200	Vendor will perform web hosting services for the "boards and commissions" software for the 3-1-1 program. The vendor will maintain the software and provide periodic updates remotely.	03/26/2018	03/31/2024	REGULAR
35440 - 19/20 - MODIFICATIONS	February 1, 2021	HUMAN RESOURCES -- HRD	\$80,000	\$155,000	Provide expert test development consultation for the H030 Fire Captain selection process and defend that selection process against legal challenge as necessary.	12/18/2020	06/30/2024	REGULAR
					The Juvenile Probation			

Department
(JPD) operates
two 24-
hour/7-day a
week
residential
facilities for
youth:
Juvenile Hall
and Log Cabin
Ranch(located
in La Honda
CA). The
Board of State
& Community
Corrections
(BSCC) Title
15 minimum
standards for
juvenile
facilities
mandates
physical
education as a
"required
element" of
the facility
education
program and
on-grounds
school. In
order to
comply with
the State
Education
Code,
applicable
federal
education
statutes and
regulations,
JPD must
ensure that it
has a highly
effective
physical
education
program, in
order to

43740 - 17/18 -

MODIFICATIONS

February 1, 2021	JUVENILE PROBATION -- \$0 JUV	\$600,000	maximize the amount of time youth are out of their rooms and not confined to their beds. Per BSCC, Article 6, Programs and Activities, Section 1371, juvenile facilities must provide a daily supervised exercise, activity and recreation program, that includes "large muscle activity each day" as well as outdoor activity. The Welfare and Institutions Code (WIC), Division 2 requires that residential programs provide competency- based education services, training, and physical education, for wards of the Juvenile Court. To comply with all statutes and regulations regarding youth who are confined to	07/01/2020 12/31/2021 REGULAR
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juvenile
detention
facilities, JPD
is seeking a
supplier to
develop and
implement a
safe,
compliant,
comprehensive
and structured
physical
education,
exercise,
activity, and
recreation
program that
includes
evidence-
based
instructional
strategies to
respond to
youth with
different
learning styles
and abilities.

TOTAL AMOUNT \$176,000

Regular/Continuing/Annual Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-Needed Airport Planning Professional Services

Funding Source: Airport Capital and Operating Funds

PSC Duration: 7 years

PSC Amount: \$25,000,000

1. Description of Work

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

The proposed work involves the planning of airport facilities and resources to serve the core aviation business of San Francisco International Airport (SFO). Scopes of projects range from project-specific planning to integrated facilities master planning and report output, including, but not limited to: (1) aviation demand analysis, including forecasts of passengers, cargo, aircraft mix, (2) developing a comprehensive demand management program, (3) providing spatial and operational planning for passenger terminal facilities, (4) analyzing passenger, baggage, airfield, and ground access evaluations using simulation modeling, (5) updating the Airport Layout Plan, including assessing data needs and collecting and analyzing data according to Federal Aviation Administration (FAA) regulations, (6) providing planning support for on-Airport land use planning development, (7) providing planning support for the Airport Transportation System, (8) providing support in programmatic implementation concepts and plans, (9) conducting technical noise analysis in support of the Airport according to relevant federal and state regulations, and (10) assisting the advancement of highly specialized studies and provide support staff as may be required.

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

This service is necessary because complex airport and aviation planning support requiring highly specific expertise are needed intermittently by the Airport and are outside the scope of continuous Airport Planning staff capabilities. Additionally, the reporting mandated by the required agencies demands third-party contractors for impartiality. These agencies include the FAA, bond rating agencies, the San Mateo County Office of Emergency Services (Sheriff's Office), etc. Denial will result in delays in the implementation of critical airport infrastructure projects, and a loss in revenue and airport market share in the Bay Area.

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.

These services have been provided through as-needed airport planning service contracts, most recently under PSC #42498-15/16.

D. Will the contract(s) be renewed?

Yes, if there continues to be a need for such services at the Airport.

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 duration of this PSC is seven years since the five-year contracts will not all start at the same time.

2. Reason(s) for the Request

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

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

A range of expertise is needed to support the various, highly unique, and specialized projects airport wide, and is not the same across all projects. This technical expertise is as needed in nature and the need for these services remains intermittent depending on the project scope.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Expertise is needed in the following areas to: 1) produce runway safety plans, 2) model airside simulations for aircraft movement, 3) analyze complex airspace imaginary surfaces, 4) forecast future aviation demand levels, 5) develop common use standard and airport land use documents, 6) create planning documents and a definition manual for development of critical airport infrastructure projects, 7) create 3D models and visualizations of infrastructure projects, and 8) create and analyze demand management and capacity studies. Additionally, the ability to develop tools that model and analyze level of service provided by Airport facilities and make recommendations to enhance level of service related to design day schedules of airport traffic.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5278, Planner 2; 5291, Planner 3; 5293, Planner 4; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- 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?

None. There are no civil service classes with this specialized expertise to conduct technical analysis and modeling as described above. Staff would continue to direct the analysis and provide reviews of consultant deliverables.

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

- A. Explain why civil service classes are not applicable.
The reports and plans need to be provided by outside experts with broad experience at other airports in order to provide assurance to regulatory agencies. Additionally, the work needed is specialized, is only needed on a project-specific basis, and requires different kinds of expertise and program use for each project as mentioned above.
- 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 scope of work requires different backgrounds and expertise. The specialized knowledge and expertise related to these services are also intermittent in nature and will be provided for on an as-needed basis. The specialized knowledge also requires ongoing experience at other airports, which civil service staff cannot provide.

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 contract? If so, please explain what that will entail; if not, explain why not.
No. None, there is not an anticipated need for training given the specificity of the work.
- 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. Union Notification: On 11/18/2020, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, 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: 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# 41964 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Ricardo Valle (AIR)

From: dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfso.com
Sent: Wednesday, November 18, 2020 9:08 AM
To: Cynthia Avakian (AIR); Laxamana, Junko (BOS); 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; Ricardo Valle (AIR); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 41964 - 20/21

RECEIPT for Union Notification for PSC 41964 - 20/21 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 41964 - 20/21 for \$25,000,000 for Initial Request services for the period 02/01/2021 – 01/31/2028. 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%2F15658&data=04%7C01%7Cricardo.e.valle%40flysfso.com%7Cb6e5aa9317a943aa062908d88be5638a%7C22d5c2cfce3e443d9a7fdfcc0231f73f%7C0%7C0%7C637413164616768246%7CUnknown%7CTWFpbGZsb3d8eyJWlloiMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTil6Ikl1haWwiLCJXVCi6Mn0%3D%7C1000&sd=I%2BjalS8EjmydpOAdayfO4Dh8nE0XX0e3Muju6QvoPvk%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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR Dept. Code: AIRType of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)Type of Approval: ☐ Expedited ☒ Regular (☐ Omit Posting)Type of Service: As Needed Airport Planning Professional ServicesFunding Source: Air Op, Capital, Federal Funds PSC Duration: 6 years 4 weeks
PSC Amount: \$16,000,000 PSC Est. Start Date: 01/04/2016 PSC Est. End Date: 01/31/2022**1. Description of Work****A. Scope of Work:**

Planning of airport facilities and resources to serve the core aviation business of San Francisco International Airport (SFO). Scopes of projects range from project-specific planning to integrated facilities master planning and report output, including, but not limited to: (1) forecasting future aviation activity and passenger levels, (2) developing common use standards for airport facilities and systems, (3) recommending facility improvements to enhance level of service and asset utilization, (4) updating the Airport Layout Plan, land use plans, and production of the long term Airport Development Plan and related documents, (5) planning support for airfield development projects, (6) airfield and airspace simulation modeling of NextGen and other advanced navigation technologies, (7) terminal and roadway simulation modeling in support of terminal and ground access planning projects, and (8) technical noise analysis in support of broader land use planning.

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

Complex aviation planning tasks requiring highly specific expertise are needed intermittently by the Airport and are outside the scope of continuous airport planning and staff capabilities. The needed reports must be generated by contractors in order to provide assurance to the agencies requiring the reports: the Federal Aviation Administration, bond rating agencies, the San Mateo County Office of Emergency Services (Sheriff's Office), etc. Denial will result in delays in the implementation of critical airport infrastructure projects, and a loss in revenue and airport market share in the Bay Area.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.

These services have been provided through on-call services contracts, most recently under PSC # 4084-05/06.

D. Will the contract(s) be renewed? Yes, if there continues to be a need for such services at SFO.**2. Union Notification:** On 11/04/2015, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USEPSC# 42498 - 15/16

DHR Analysis/Recommendation:

02/01/2016

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 02/01/2016

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Expertise in producing runway safety plans, modeling airside simulations for aircraft movement, forecasting future aviation levels, developing common use standard and airport land use documents, creating planning documents and a definition manual for development of critical airport infrastructure projects, and creating and analyzing demand management and capacity studies. Additionally, the ability to develop tools that model and analyze level of service provided by Airport facilities and make recommendations to enhance level of service related to

B. Which, if any, civil service class(es) normally perform(s) this work?

5278,5298,5299,

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:

No.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

The reports and plans need to be provided by outside experts in order to provide assurance to regulatory agencies. Also, the work needed is specialized, is only needed on a project-specific basis, and requires different kinds of expertise for each project as mentioned above.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.

No. Each team requires different backgrounds and expertise. As the work is accomplished, new teams will be created to address other specialized services.

5. Additional Information (if "yes", attach explanation)**YES NO**

- | | | |
|--|--------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
There will be no training included in this PSC. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

☒ THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 01/12/2016 BY:

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

Address: P. O. Box 8097 San Francisco, CA 94128

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Insurance Compliance Software and Professional Services

Funding Source: Airport Operating Funds

PSC Amount: \$650,000

PSC Est. Start Date: 03/01/2021

PSC Est. End Date 09/30/2028

1. Description of Work

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

Contractor will provide a software system for the Airport to manage insurance compliance, and also provide data migration, testing, software support and maintenance services. As part of software support, contractor may also perform insurance compliance reviews for documents that cannot be processed by the software and provide customer support for SFO staff and contractors using the system.

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

This service will help ensure that the Airport's contractors meet minimum insurance requirements in accordance with contractual obligations. Without the software and support services, Airport staff would need to independently track and manage insurance for over 260 contractors and 500 contracts and purchase orders. This could result in manual errors, loss of timely insurance reviews, and a reduction in compliance rates of Airport contractors, resulting in a large financial and safety risk to the Airport.

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 service was previously provided through a contract held by the City and County of San Francisco's City Administrator's Office.

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.

The duration of the contract will be over six years including all options.

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 request is for a short-term project that requires expertise and knowledge in risk management, insurance compliance systems (software and business processes) and reviewing insurance documents that are complex and oftentimes unique to the aviation industry.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor will be required to have expertise and knowledge in risk management, and be able to provide a fully functioning insurance compliance software system. Contractor must also be experienced with implementing and maintaining an insurance compliance software system, and be able to provide full service support including training, reporting, incident resolution, and performing compliance reviews.

B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 1823, Senior Administrative Analyst; 1824, Pr 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?

None, as there are no available resources within the City for this service.

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

A. Explain why civil service classes are not applicable.

Existing civil service classes are not applicable because the proposed software requires specialized knowledge in risk management and implementing insurance compliance 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. Software implementation is expected to occur during a short (3-6 month) timeframe, and maintenance and support of the proposed system will be provided by the contractor.

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 contract? If so, please explain what that will entail; if not, explain why not.

Yes. The contractor will provide user training only to City and County employees after the software is implemented. Training will be conducted through virtual sessions and will provide education to City and County employees that will be users of the software. The trainings will include on-boarding of new users to the software and will cover use of the software to track and report on insurance compliance. Initial on-boarding will consist of approximately 10 hours of training that will be offered to SFO's Risk Management group with the following civil service classifications: 0932 Manager IV, 1686 Auditor III, and 1823 Senior Administrative Analyst.

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. Union Notification: On 12/03/2020, the Department notified the following employee organizations of this PSC/RFP request:

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: 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# 43624 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

Receipt of Union Notification(s)

From: dhrrpscordinator@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; [Janelle Dung-Sapantay \(AIR\)](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 43624 - 20/21
Date: Thursday, December 3, 2020 8:49:09 AM

RECEIPT for Union Notification for PSC 43624 - 20/21 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 43624 - 20/21 for \$650,000 for Initial Request services for the period 03/01/2021 – 09/30/2028. 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/15601> 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: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Racial Equity Consulting

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$250,000

1. Description of Work

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

Vendor will conduct an internal assessment of City Administrator/Administrative Services Divisions (ADM) staff's beliefs, attitudes, and practices and evaluate ADM's past and current projects through a racial equity lens. Vendor will provide summary of data that protects the identity of individuals who participated. Vendor will provide trainings and facilitate conversations around racial equity across ADM; help staff develop a vision for a more inclusive and equitable organizational culture; and build staff and organizational capacity to develop programs, policies, and practices that support and advance racial equity over time. Finally, vendor will help ADM staff develop a practical action plan that is measurable and actionable.

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

The City has launched a racial equity initiative driven by the Human Rights Commission asking each department to participate in an external and internal assessment of racial equity as it is reflected in the department. Additionally, this department will be reviewing comprehensive cultural competencies across a broad range of diverse aspects of the department's internal and external operations. Denial of this request would hamper our department's ability to move the department toward the adoption of a comprehensive racial equity strategy and other accompanying cultural competency, equity, and staff development needs.

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.

These services have not been provided in the past.

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.
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.

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Services will be as-needed for various programs/offices of the City Administrator. Specialized knowledge and experience in racial equity issues are required.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Specify required skills and/or expertise: A qualified consultant must have at least five years of experience providing consulting services providing consulting to organizations relating to racial equity, cultural competency, related equity issues and staff development. This will include assisting in the

development of a training curriculum, provide coaching to staff, facilitating retreats and trainings, and other content-specific training topics.

B. Which, if any, civil service class(es) normally perform(s) this work? 1231, EEO Senior Specialist;

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?

The City has launched a racial equity initiative driven by the Human Rights Commission asking each department to participate in an external and internal assessment of racial equity as it is reflected in the department. No City department offers this in-depth assessment and training of city staff. Other City departments who are carrying out similar services are doing so under contract.

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 classification has in-depth knowledge of racial equity and ability to assess the beliefs, attitudes, and practices of our staff. No civil service classification have the ability to evaluate ADM's past and current projects through a racial equity lens, as well as the ability to conduct department-wide assessments and trainings on racial equity. We reviewed classifications such as 1233 Equal Opportunity Programs Program Specialist and 1824 Principal Administrative Analyst, however these positions related only very slightly to the skills required.

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 is as-needed work requiring continued and updated expertise to perform required 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 contract? If so, please explain what that will entail; if not, explain why not.
Yes. Please see memorandum attached.

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. Union Notification: On 10/19/2020, 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# 41243 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

From: dhrrpscordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
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; Lubamersky, Joan \(ADM\); DHR-PSCCoordinator, DHR \(HRD\)](mailto: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;Lubamersky,Joan(ADM);DHR-PSCCoordinator,DHR(HRD)@ifpte21.org)
Subject: Receipt of Notice for new PCS over \$100K PSC # 41243 - 20/21
Date: Monday, October 19, 2020 1:34:55 PM

RECEIPT for Union Notification for PSC 41243 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 41243 - 20/21 for \$250,000 for Initial Request services for the period 01/10/2021 – 01/09/2026. 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/15636> 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)



OFFICE OF THE CITY ADMINISTRATOR



London M. Breed, Mayor
Naomi M. Kelly, City Administrator

October 15, 2020

MEMORANDUM

TO: Honorable Civil Service Commission

FROM: Joan Lubamersky, Contract Coordinator
Office of the City Administrator

SUBJ: Training Memorandum PSC 41243 20.21

A contractor that specializes in racial equity topics will train staff from our Digital Services Team. The trainings will help staff understand key terms and concepts related to racial equity, and the importance of racial equity as a key value of the department. In addition, the contractor will build staff and organizational capacity to develop programs, policies, and practices that support and advance racial equity over time.

Number of sessions: 5 sessions. Contractor will initially work with the Racial Equity Working Group (4 short sessions), then in conjunction with the working group, contractor will train Digital Services team (1 long session).

Duration: 1-2 hours per session with the Racial Equity Working group, and a day-long session for the teamwide training.

Sessions with the Racial Equity Working group will involve eight employees. The day-long session for the Digital Services team will involve 35 employees.

The classifications of Digital Services staff that will benefit from this training are:

- 0953 – Deputy Director III
- 0941 – Manager VI
- 0932 – Manager IV
- 1822 – Administrative Analyst
- 1064 – IS-Programmer Analyst-Principal
- 1043 – IS Engineer-Senior
- 1044 – IS Engineer-Principal
- 1053 – IS Business Analyst-Senior
- 1054 – IS Business Analyst-Principal

There are 25 departments, divisions, and programs in the Office of the City Administrator (ADM), and they will be relying on the same contractor to provide similar services for their staff. At this point, we don't know which divisions and offices are interested, so it would be difficult for us to estimate how many hours of training they will need, and which classifications will benefit from this training.

Thank you for your consideration.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CITY PLANNING -- CPC

Dept. Code: CPC

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Consultant services for Racial and Social Equity: Regulatory Review Practices and Codes

Funding Source: General funds

PSC Amount: \$500,000

PSC Est. Start Date: 01/17/2021

PSC Est. End Date 01/16/2023

1. Description of Work

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

The San Francisco Planning Department is seeking to a Contractor to review and make recommendations regarding racial and social equity as they related to the department's regulatory review practices and codes, including extensive stakeholder engagement.

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

The services are required to bring outside perspective, expertise, and staffing to Department staff on two specific, one-time priority projects of the Department's equity plan. The two priority projects within the RFP are 1) racial and social equity impact analysis; and 2) planning code audit. Department staff identified these projects during brainstorm sessions for the department's equity plan. Department staff also identified bringing an outside perspective and expertise for these priority projects, which shaped the RFP. The Planning Commission and the Board of Supervisors agreed, in that both entities approved the budget for this RFP for fiscal years 20/21 and 21/22. The Planning Commission and Historic Preservation Commissions adopted resolutions in summer 2020 to center the department's planning on racial and social equity. The RFP is in support of those resolutions. Both projects have also been identified by communities as high priorities for the department over the years, but the department hasn't had the internal resources to complete these projects. The consequences of denial may lead to the department not completing equity plan priority projects. The partial completion of the project may lead to not implementing or providing recommendations that don't have the value of outsider perspective given the implicit biases Department staff may have. Department staff also does not have expertise in some of the RFP services such as environmental justice analysis for NEPA and audits.

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

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.

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.

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Short term or one time projects requiring specialized skills and expertise not currently maintained by Planning staff.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. Stakeholder engagement, including a track record of effective community

engagement with and within communities of color, especially in San Francisco, using mixed-method approaches that achieve equitable outcomes, and representing the diversity of San Francisco and the bay area. 2. Regulatory review experience, including with CEQA application and regulatory review processes, the department's impact analyses and San Francisco Planning Code, and geo-spatial mapping and database management. 3. Racial and Social equity experience, including preparing action plans or assessment tools for racial and/or social equity or diversity, equity, and inclusion programs and conducting or providing guidance for health impact assessments, environmental justice analysis for the National Environmental Policy Act or General Plans, or other types of impact analyses that address racial and social impacts. 4. Audits/Independent Evaluations experience, including providing independent evaluations, leadership, and recommendations supported by evidence to government organizations. The above expertise may be professional and lived.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5278, Planner 2; 5291, Planner 3; 5293, Planner 4; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractor's staff would perform the requested services at their company offices, with the possibility of some on-site review of the development or plan area.

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

The Department re-allocated staff to work on these equity plan priority projects. However, there is not enough Department staff available to complete these equity plan priority projects nor do Department staff have the outside perspective and expertise to complete these equity plan priority projects, as described elsewhere herein.

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 for this one-time RFP.
- 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 would not be practical to create various classifications due to purpose of this RFP and the time-bound nature of it.

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 contract? If so, please explain what that will entail; if not, explain why not.
No. No, other than the traditional training and education, various combinations of knowledge & expertise is required for 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. Union Notification: On 11/23/2020, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Carpet, Linoleum & Soft Tile; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local

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

Name: James Glik Phone: 415-558-6476 Email: james.glik@sfgov.org

Address: 49 South Van Ness Avenue, Suite 1400 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48666 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of james.glik@sfgov.org
Sent: Monday, November 23, 2020 11:53 PM
To: Glik, James (CPC); Laxamana, Junko (BOS); amakayan@ifpte21.org; anthony@dc16.us; tony@dc16.us; 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; Glik, James (CPC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 48666 - 20/21

RECEIPT for Union Notification for PSC 48666 - 20/21 more than \$100k

The CITY PLANNING -- CPC has submitted a request for a Personal Services Contract (PSC) 48666 - 20/21 for \$500,000 for Initial Request services for the period 01/17/2021 – 01/16/2023. 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/15756> 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: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-Needed Professional Services for Special Inspection and Testing Services

Funding Source: Interdepartmental Work Orders

PSC Amount: \$4,000,000

PSC Est. Start Date: 01/05/2021

PSC Est. End Date 06/30/2027

1. Description of Work

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

Provide special construction and building materials inspection and testing services for the City's building, construction and renovation projects on an as-needed basis. The testing agencies will utilize certified staff to perform reinforced concrete, high strength bolting, structural steel welding, masonry, shotcrete, and spray-applied fireproofing inspection and testing services.

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

This contract will offer services that are normally not provided by the City's staff and facilities. These services are required as part of code requirement for the building inspection process. Denial could cause building code violations, occupancy denials and delays to projects that would result in additional costs to the City. The City does not possess these special expertise and testing laboratories.

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 service was previously approved by the Civil Service Commission. The most recent PSC # is 48966-16/17. A new solicitation is required to award more work because the previous contracts will no longer be able to issue new work starting next year.

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 exceeds 5 years to account for the extra time needed to advertise and award contracts. However, all contract terms will not exceed 5 years.

2. Reason(s) for the Request

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

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Special testing and inspection services are required on an if and as-needed basis when the City staff is unable to perform the services due to peak workloads or lack of specialized expertise, facilities or equipment.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Licensed and/or certified professionals with expertise in special construction materials inspection and testing for a wide variety of construction activities such as Office of Statewide Health Planning and Development (OSHPD) inspections, Corrosion Inspection and Testing, International Conference of Building Officials (ICBO) and Certified Welding Inspection (CWI) inspections, structural, under-pinning, shoring observation, spray-applied fireproofing, etc.

B. Which, if any, civil service class(es) normally perform(s) this work? 5174, Administrative Engineer; 5207, Assoc Engineer; 5304, Materials Testing Aide; 5305, Materials Testing Technician; 6318, Construction Inspector; 6319,

Senior Const Inspector;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Consultants will provide extensive testing facilities and equipment for these services. The City does not have these facilities and equipment and it is not cost-effective for the City to provide them.

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

The Department is encouraging current employees to get education, training, and certification in various special inspection and testing methods.

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

- A. Explain why civil service classes are not applicable.
Civil Service classifications are applicable. Qualified City staff and laboratory will continuously provide certain limited special inspection and testing services; however, the broad scope of special inspection services is more specialized that the unique work exceeds the City's current capabilities of staff and equipment.
- 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. Civil Service classifications already exist. Special testing and inspection services are required on an if and as-needed basis when the City staff is unable to perform the services due to peak workloads or lack of specialized expertise, facilities or equipment.

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 contract? If so, please explain what that will entail; if not, explain why not.
No. No, City classifications already exist. This will only be utilized on an as-needed basis.
- 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. Union Notification: On 11/17/2020, the Department notified the following employee organizations of this PSC/RFP request:
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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41062 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required
DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Sy, Don (DPW)

From: Burns, Alexander (DPW)
Sent: Tuesday, November 17, 2020 4:56 PM
To: Sy, Don (DPW); Williams, Hyun (DPW); Macaranas, Belle (DPW)
Subject: FW: Receipt of Notice for new PCS over \$100K PSC # 41062 - 20/21

FYI

-----Original Message-----

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of alexander.burns@sfdpw.org
Sent: Tuesday, November 17, 2020 4:49 PM
To: Burns, Alexander (DPW) <alexander.burns@sfdpw.org>; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Sy, Don (DPW) <don.sy@sfdpw.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Notice for new PCS over \$100K PSC # 41062 - 20/21

RECEIPT for Union Notification for PSC 41062 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 41062 - 20/21 for \$4,000,000 for Initial Request services for the period 01/05/2021 – 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:

<http://apps.sfgov.org/dhrdrupal/node/15743> 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: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-Needed Special Inspection and Testing Services

Funding Source: Interdepartmental Work Orders

PSC Amount: \$4,000,000

PSC Est. Start Date: 02/06/2017

PSC Est. End Date 07/31/2023

1. Description of Work

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

Provide special construction and building materials inspection and testing services for the City's building, construction and renovation projects on an as-needed basis. The testing agencies will utilize certified staff to perform reinforced concrete, high strength bolting, structural steel welding, masonry, shotcrete, and spray-applied fireproofing inspection and testing services.

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

This contract will offer services that are normally not provided by the City's staff and facilities. These services are required as part of code requirement for the building inspection process. Denial could cause building code violations, occupancy denials and delays to projects that would result in additional costs to the City. The City does not possess these special expertise and testing laboratories.

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 service was previously approved by the Civil Service Commission on PSC # is 4076-09/10.

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.

PSC duration exceeds 5 years to account for time needed to advertise and award contracts. Public Works' as needed services can not exceed a contract term of more than 5 years.

2. Reason(s) for the Request

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

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Special testing and inspection services are required on an if and as-needed basis when the City staff is unable to perform the services due to peak workloads or lack of specialized expertise, facilities or equipment.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Licensed and/or certified professionals with expertise in special construction materials inspection and testing for a wide variety of construction activities such as Office of Statewide Health Planning and Development (OSHPD) inspections, Corrosion Inspection and Testing, International Conference of Building Officials (ICBO) and Certified Welding Inspection (CWI) inspections, structural, under-pinning, shoring observation, spray-applied fireproofing, etc.

B. Which, if any, civil service class(es) normally perform(s) this work? 5174, Administrative Engineer; 5207, Assoc Engineer; 5304, Materials Testing Aide; 5305, Materials Testing Technician; 6318, Construction Inspector; 6319, Senior Const Inspector;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes.
Consultants will provide extensive testing facilities and equipment for these services. The City does not have these facilities and equipment and it is not cost-effective for the City to provide them.

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

The Department is encouraging current employees to get education, training, and certification in various special inspection and testing methods.

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

- A. Explain why civil service classes are not applicable.
Civil Service classifications are applicable. Qualified City staff and laboratory will continuously provide certain limited special inspection and testing services; however, the broad scope of special inspection services is more specialized than the unique work exceeds the City's current capabilities of staff and equipment.
- 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. Civil Service classifications already exist. Special testing and inspection services are required on an if and as-needed basis when the City staff is unable to perform the services due to peak workloads or lack of specialized expertise, facilities or equipment.

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 contract? If so, please explain what that will entail; if not, explain why not.
No. No, City classifications already exist. This will only be utilized on an as-needed basis.
- 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. Union Notification: On 12/12/2016, the Department notified the following employee organizations of this PSC/RFP request:
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: Stacey Camillo Phone: 415-554-4886 Email: stacey.camillo@sfdpw.org

Address: 1155 Market Street, 4th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48966 - 16/17

DHR Analysis/Recommendation:

Commission Approval Required

action date: 02/06/2017

Approved by Civil Service Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-Needed Architectural Design Services

Funding Source: Departmental Work Orders

PSC Amount: \$9,000,000

PSC Est. Start Date: 12/01/2020

PSC Est. End Date 06/30/2027

1. Description of Work

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

Architectural services on an as-needed basis, for public building projects including but not limited to master plans, environmental reviews, programming and planning studies, assessments of existing facilities, green building evaluations, utility studies, design drawings, specifications, cost estimates, project schedules, adaptive re-use of existing facilities, modifications to life safety systems and other infrastructure, and new facilities.

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

The as-needed contracts will only be utilized when Public Works cannot provide the services in a timely manner due to unavailability of staff or when specialty services are required. If services cannot be provided in a timely manner the City's ongoing operations will be impacted and thereby cause delay to the provision of services necessary for the public interest.

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 service has been provided in the past. Most recent personal services contract approval number is PSC 41026-15/16.

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 additional time in the PSC Duration is to allow for any delays in processing and awarding the contracts. The contracts will have a duration of no more than 5 years.

2. Reason(s) for the Request

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

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

☒ Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

☒ 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:

This service will only be required on an as-needed basis when either City staff don't have the capacity to fulfill all project requests, causing delays, or if specialized services are required. Certain federal or state grants require the utilization of specialized contract services. These services will only be utilized on an as-needed basis.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Professional architectural services typically required for building projects in the public sector; services of licensed sub-consultants with expertise including but not limited to the following

disciplines: historic preservation, civil, structural, electrical, mechanical/plumbing, resource efficiency with availability of LEED Accredited Professionals, LEED Compliance, building commissioning, elevator, access specialist, fire protection, code compliance, waterproofing, roofing, landscape architecture, lighting, audio/visual, telecom, IT, security, acoustical, signage/wayfinding, food service consulting, architectural photography, curtain wall, hardware, and facilities' furnishings/ interior design.

B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5215, Fire Protection Engineer; 5218, Structural Engineer; 5219, Senior Structural Engineer; 5260, Architectural Assistant 1; 5261, Architectural Assistant 2; 5262, Landscape Architect Assoc 1; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5272, Landscape Architect Assoc 2; 5274, Landscape Architect;

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?

Department has recruited and hired more people for above civil service classes. As-needed contract services will only be utilized when and if the work cannot be prudently performed by internal staff.

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

A. Explain why civil service classes are not applicable.

These are as-needed contract services only. They will only be utilized when the following conditions exist: • The Bureau is working at full capacity and postponement of pending projects would be contrary to the public interest, or • Specialized services are required that are not available internally and for which there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

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 services are only going to be utilized 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 contract? If so, please explain what that will entail; if not, explain why not.
No. Since City staff are knowledgeable about most aspects of general Architectural Design work, and the specialty services are only going to be utilized on an as-needed basis, there is no need for Consultants to provide training to existing staff.

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.
Yes.

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. Union Notification: On 11/12/2020, the Department notified the following employee organizations of this PSC/RFP request:
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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 49 South Van Ness Ave, 16th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42862 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Williams, Hyun (DPW)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
Sent: Thursday, November 12, 2020 2:52 PM
To: Burns, Alexander (DPW); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Williams, Hyun (DPW); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42862 - 20/21

RECEIPT for Union Notification for PSC 42862 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 42862 - 20/21 for \$9,000,000 for Initial Request services for the period 12/01/2020 – 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:

<http://apps.sfgov.org/dhrdrupal/node/15725> 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)



U.S. Department
of Transportation
**Federal Aviation
Administration**

Advisory Circular

Subject: Architectural, Engineering, and Planning
Consultant Services for Airport Grant Projects

Date: 9/30/2014

AC No: 150/5100-14E

Initiated By: AAS-100

1 **Purpose.**

This advisory circular (AC) provides guidance for airport sponsors in the selection and engagement of architectural, engineering, and planning consultants. It also discusses services that normally would be included in an airport grant project, types of contracts for these services, contract format and provisions, and guidelines for determining the reasonableness of consultant fees.

2 **Cancellation.**

This AC cancels AC 150/5100-14D, *Architectural, Engineering, and Planning Consultant Services for Airport Grant Projects*, dated August 30, 2005.

3 **Application.**

A Sponsor is required to award each contract, or sub-contract for program management, construction management, planning studies, feasibility studies, architectural services, preliminary engineering, design, engineering, surveying, mapping or related services with respect to the project in the same manner as a contract for architectural and engineering services is negotiated under Title IX of the Federal Property and Administrative Services Act of 1949 (40 U.S.C. Chapter 11, Selection of Architects and Engineers), or an equivalent qualifications-based requirement prescribed for or by the sponsor of the airport. See 49 U.S.C. § 47107(a) (17) and the grant assurances.

Title 2 of the Code of Federal Regulations (C.F.R.), part 200, establishes uniform administrative rules for Federal grants. The FAA prepared this guidance to assist Sponsor compliance with the procurement requirements of §§200.317-200.326.

This AC does not apply to airport projects that are fully funded with passenger facility charge (PFC) funds.

4 Principal Changes.

The AC incorporates the following principal changes:

1. Clarified Independent Fee Estimates processes.
2. Clarified multiple consultant selection process.
3. Added “Specific Rates of Compensation” method of contracting.
4. Revised and expanded discussion of Alternative Project Delivery Methods, moved to Appendix G.
5. Updated the advisory circular format to the decimal numbering system.
6. The Office of Management and Budget published the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; Final Rule, in 78 Federal Register Notice 78590, December 26, 2013. This final guidance contains the administrative requirements formerly contained in (A-110 and A-102), cost principles (A-21, A-87, and A-22), and audit requirements (A-50, A-89, and A-133) for federal awards. As of December 26, 2014, a Sponsor must implement applicable the requirements of 2 CFR §200 to remain allowable for federal assistance.



Michael J. O'Donnell
Director of Airport Safety and Standards

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CHAPTER 1. INTRODUCTION

1.1 Overview.

This advisory circular (AC) provides guidance for airport sponsors in the selection and engagement of architectural, engineering, and planning consultants. This AC discusses services normally included in an airport grant project, types of contracts for these services, contract format, and guidelines for determining the reasonableness of consultant fees.

1.2 Definitions.

Definitions of the terms used in this AC are listed in Appendix A.

1.3 Referenced Documents.

Documents and regulations referenced throughout this circular are listed in Appendix B.

1.4 Types of Consultant Services.

There are two separate and distinct categories of consultant services that are utilized for projects conducted under airport grant programs. The first category involves planning services. The second involves Architectural/ Engineering (A/E) services for the design and construction administration/inspection of airport projects. These two categories of consultant services are discussed below.

1.4.1 Aviation Planning Services.

This category includes studies under the broad headings of airport system and master planning, airport noise compatibility planning and environmental assessments and related studies. These studies include, but are not limited to, the following activities:

1. Design study to establish the framework and detailed work program.
2. Airport data collection and facility inventories.
3. Aeronautical activity forecasts and demand/capacity analyses.
4. Facility requirements determination.
5. Airfield modeling for capacity and delay.
6. Airport layout and terminal area plan development.
7. Airport noise studies under 14 CFR Parts 150 and 161.
8. Compatible land-use planning in the vicinity of airports.
9. Airport site selection studies.
10. Airport development schedules and cost estimates.
11. Airport financial planning and benefit cost analysis.

12. Participation in public information and community involvement programs and/or public hearings relating to airport development and planning projects.
13. Environmental Assessments (EA), Environmental Impact Statements (EIS), and other studies in accordance with FAA Orders 5050.4 and 1050.1.
14. Airspace analysis.
15. GIS data collection, entry, and analysis and other electronic graphical/mapping efforts.

1.4.2 Architectural/Engineering Services for Airport Development Projects.

This category includes the basic A/E services normally required for airport development projects. It involves services generally of an architectural, civil, geotechnical, structural, mechanical, and electrical engineering nature. In addition, there may be some services outside those normally considered basic that are discussed in paragraph 1.5. The basic services are usually conducted in, but are not limited to, the four distinct and sequential phases summarized below:

1.4.2.1 **Preliminary Phase.**

This phase involves those activities required for defining the scope of a project and establishing preliminary requirements. Some examples of activities within this phase of a project include, but are not limited to:

1. Coordinating with the sponsor on project scope requirements, finances, schedules, operational safety and phasing considerations, site access and other pertinent matters.
2. As applicable, coordinating project with local FAA personnel and other interested stakeholders to identify potential impacts to their operations.
3. Planning, procuring, and/or preparing necessary surveys, geotechnical engineering investigations, field investigations, and architectural and engineering studies required for design considerations.
4. Developing design schematics, sketches, environmental and aesthetic considerations, project recommendations, and preliminary layouts and cost estimates.
5. Preparing project design criteria and other bridging documents commonly used for alternative project delivery methods such as design-build contracting.

1.4.2.2 **Design Phase.**

This phase includes all activities required to undertake and accomplish a full and complete project design. Examples include, but are not limited to, those below:

1. Conducting and attending meetings and design conferences to obtain information and to coordinate or resolve design matters.

2. Collecting engineering data and undertaking field investigations; performing geotechnical engineering studies; and performing architectural, engineering, and special environmental studies.
3. Preparing necessary engineering reports and recommendations.
4. Preparing detailed plans, specifications, cost estimates, and design/construction schedules.
5. Preparing Construction Safety and Phasing Plan (CSPP).
6. Printing and providing necessary copies of engineering drawings and contract specifications.

1.4.2.3 **Bidding and Negotiation Phase.**

These activities are sometimes considered part of the construction phase. They involve assisting the sponsor in advertising and securing bids, negotiating for services, analyzing bid results, furnishing recommendations on the award of contracts, and preparing contract documents.

1.4.2.4 **Construction Phase.**

This phase may include all basic services rendered after the award of a construction contract, including, but not limited to, the following activities:

1. Providing consultation and advice to the sponsor during all phases of construction.
2. Representing the sponsor at preconstruction conferences.
3. Inspecting work in progress periodically and providing appropriate reports to the sponsor.
4. Reviewing and approving shop and erection drawings submitted by contractors for compliance with design concept/drawings.
5. Reviewing, analyzing, and accepting laboratory and mill test reports of materials and equipment.
6. Assisting in the negotiation of change orders and supplemental agreements.
7. Observing or reviewing performance tests required by specifications.
8. Determining amounts owed to contractors and assisting sponsors in the preparation of payment requests for amounts reimbursable from grant projects.
9. Making final inspections and submitting punch-lists and a report of the completed project to the sponsor.
10. Reviewing operations and maintenance manuals.

1.4.2.5 **Project Closeout Phase.**

This phase includes all basic services rendered after the completion of a construction contract, including, but not limited to, the following activities:

1. Making final inspections and submitting punch-lists and a report of the completed project to the sponsor.
2. Providing record drawings.
3. Preparing summary of material testing report
4. Preparing summary of project change orders
5. Preparing grant amendment request and associated justification, if applicable.
6. Preparing final project reports including financial summary.
7. Obtaining release of liens from all contractors.

1.5 **Special Services.**

1.5.1 The development of some projects may involve activities or studies outside the scope of the basic design services routinely performed by the consultant. These special services may vary greatly in scope, complexity, and timing and may involve a number of different disciplines and fields of expertise.

1.5.2 Consultants performing special services may be employed directly by the sponsor to implement one or more phases of a project or may be employed by the principal consultant via a subcontract agreement. In certain instances, these services may be performed by the principal consultant. Some examples of special services that might be employed for airport projects include, but are not limited to, the following:

1. Soil investigations, including core sampling, laboratory tests, related analyses, and reports.
2. Detailed mill, shop, and/or laboratory inspections of materials and equipment.
3. Land surveys and topographic maps.
4. Field and/or construction surveys.
5. Photogrammetry surveys.
6. Onsite construction inspection and/or management involving the services of a full-time resident engineer(s), inspector(s), or manager(s) during the construction or installation phase of a project. This differs from the periodic inspection responsibilities included as part of the basic services.
7. Special environmental studies and analyses.
8. Expert witness testimony in litigation involving specific projects.
9. Project feasibility studies.

10. Public information and community involvement surveys, studies, and activities.
11. Preparation of record drawings.
12. Assisting the sponsor in the preparation of necessary applications for local, State, and Federal grants.
13. Preparation of or updating of the airport layout plan.
14. Preparation of property maps.
15. Preparation of quality control plan.
16. Preparation of final report.

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CHAPTER 2. PROCEDURES FOR SELECTION OF CONSULTANTS

2.1 General.

The procedures included in this chapter provide guidance for sponsors in the selection and engagement of architectural, engineering, environmental, and planning consultants on projects funded wholly or in part under Federal airport grant programs. Adherence to these procedures will assure a sponsor of compliance with the requirements of 49 USC § 47107(a) (17) and 2 CFR §200.320, as amended.

2.1.1 49 USC § 47107(a) (17) states: “Each contract and subcontract for program management, construction management, planning studies, feasibility studies, architectural services, preliminary engineering, design engineering, surveying, mapping, and related services will be awarded in the same way that a contract for architectural and engineering services is negotiated under Chapter 11 of Title 40 or an equivalent qualifications based requirement prescribed for or by the sponsor.” In addition to the services described in this statute, the professional and incidental services listed under A/E Services in Appendix A, must also be procured using qualifications based procedures.

2.1.2 2 CFR § 200.320 establishes that procurement by competitive proposal, where price is not a factor, may only be used for procurement of architectural/engineering (A/E) services. It may not be used for other services even though an A/E firm may be a potential source to perform the service. If a conflict exists between 49 USC § 47107(a) (17) and 2 CFR 200, the statute will prevail.

2.1.3 Title IX of the Federal Property and Administrative Services Act of 1949 requires that qualifications based selection procedures be used for the selection of firms to perform architectural and engineering services. Qualifications based procedures require that a contract for A/E services be awarded pursuant to a fair and open selection process based on the qualifications of the firms. The fees for such services are established following selection of a firm through a negotiation process to determine a fair and reasonable price.

2.2 Procurement Standards.

2.2.1 The selection of qualified consultants must be made on the basis of fair negotiations and equitable fees and through selection procedures that are professionally acceptable, ensure maximum open and free competition, and avoid any suggestion of unfair or unethical conduct.

2.2.2 Consultants employed for work on projects involving airport grants must be responsible and possess the ability to perform successfully under the terms and conditions of the proposed procurement. Consideration should be given to such matters as integrity, record of past performance, extent of experience with the type of services required by the sponsor, technical resources, and accessibility to other necessary resources.

2.2.3 The Sponsor's procurement action must be void of individual and organizational conflicts of interests both real and/or perceived.

2.2.3.1 Individual conflicts of interest may exist whenever a Sponsor's employee, officer, agent or family member thereof has a financial or other interest in the firms competing for the work.

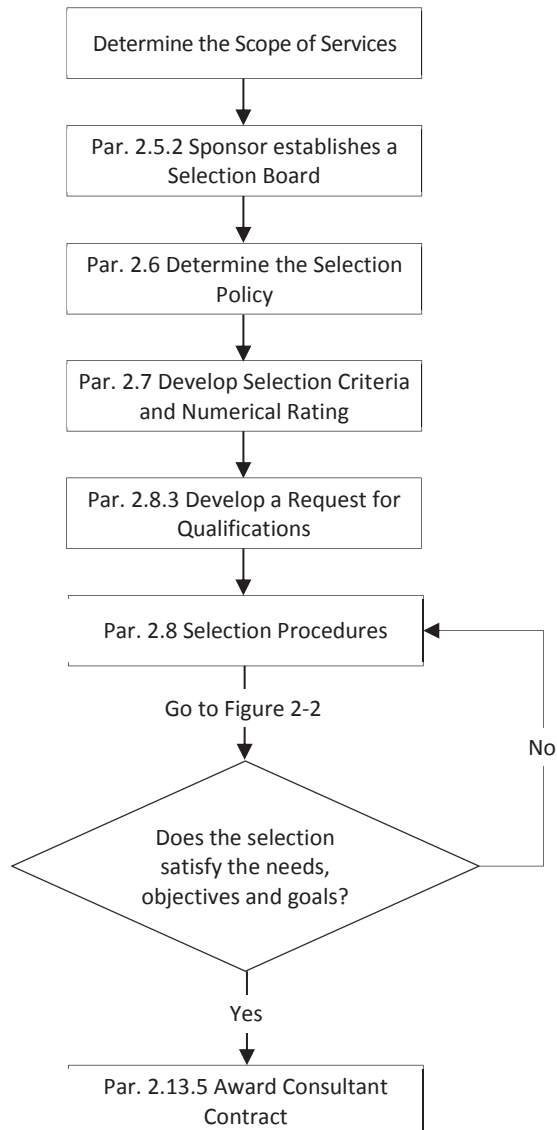
2.2.3.2 Organizational conflicts of interest may exist when there is a lack of impartiality, impaired objectivity or an unfair advantage with one or more of the firms competing for the work.

2.2.4 Sponsors must maintain sufficient records, made available at the FAA's request, to detail the significant history of their procurement action. This includes the rationale for the procurement method; the selection considerations; contract type and basis for contract price.

2.2.5 Per § 200.319, all procurement transactions must be conducted in a manner providing full and open competition. To ensure objective contractor performance and eliminate unfair competitive advantage, entities that develop or draft specifications, requirements, statements of work, and invitations for bids or requests for proposals must be excluded from competing for such procurements.

2.3 **Qualifications Based Selection Procedures.**

Consultants must be selected on the basis of their qualifications and experience, with fees determined through negotiations following selection. The qualifications of consultants are evaluated and the best qualified consultant is selected, subject to a mutual understanding of the scope of services and negotiation of a fair and reasonable fee. Figure 2-1 is an overview of the recommended Qualifications Based Consultant Selection process.

Figure 2-1. Qualifications Based Selection Process

2.4 Other Services.

- 2.4.1 Where services are to be performed in conjunction with the architectural, planning, environmental, or engineering services, they must be contracted for in the course of procuring the A/E services.
- 2.4.2 Where services such as feasibility studies, construction management, program management and other services as defined in 49 USC § 47107(a) (17) and A/E services as defined in Appendix A are to be performed, they must be procured using qualifications based procedures.

- 2.4.3 Where services are to be performed that are not in conjunction with A/E services and do not require performance by a licensed architect or engineer, the services should be acquired using local procurement procedures. An example of this type of special service would be soil borings, whereby the boring layout plan and interpretations of tests are not performed by the boring contractor. Soil borings conducted as part of a geotechnical engineering investigation or for which an independent engineer is responsible must be procured either in the course of procuring A/E services or by using qualifications based procedures.
- 2.4.4 Where services are to be performed in assisting the FAA in preparing an Environmental Impact Statement (EIS), they must be procured using qualifications based selection procedures (see paragraph 2.10).
- 2.4.5 Where a sponsor decides to utilize an Alternative Project Delivery System (APDS) such as design-build (DB) or construction manager-at-risk (CMAR), the Sponsor may use the competitive proposal approach (as defined in 2 CFR §200.320) for selection provided price and other factors such as qualifications, skill, experience, and design approach are considered when selecting a firm to perform this service. The selection of an A/E services firm is the only instance where prices must be excluded as a consideration under a competitive proposal selection. Please reference Appendix G, Alternative Project Delivery Systems, of this Advisory Circular for guidance in procuring these types of services.

2.5 **Selecting Organization.**

- 2.5.1 Within the sponsor's organization, an administrative policy should be established for designating persons authorized to select or recommend consultants for various assignments. The persons designated may include the administrator or the department head to be supplemented by others making up a selection board. The persons empowered to make the selection of one consultant over another must be kept free of pressures, both internal and external. 2 CFR § 200.318(c) requires that sponsors maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. They must not participate in selection or in the award or administration of a contract supported by Federal funds if a conflict of interest, real or apparent, would be involved.
- 2.5.2 The typical procedure for selecting a consultant is to use a selection board composed of at least three persons, with at least one being an engineer, airport planner, or other professional knowledgeable of the service required. For projects that have special design requirements or are particularly complex, the selection board should have additional technical members with the appropriate expertise in those required disciplines. The board should be prepared to evaluate potential consultants, i.e., conduct interviews and inquiries as desired and make recommendations to the governing body in accordance with Paragraph 2.8.14.

2.6 Policy for Selection.

2.6.1 The selection of a consultant must be based on a comparative analysis of the professional qualifications necessary for satisfactory performance of the service required. Moreover, the selection process must satisfy requirements for open and free competition.

2.6.2 Sponsors may procure a consultant for several projects through one procurement action provided the following conditions are met:

1. The consultant is selected using the qualifications based selection procedures described in paragraph 2.8.
2. The parties competing for the work must be advised that the work may be accomplished during the course of multiple grants. The expected schedule of projects must be defined, together with a statement of work and the required services. The statement of work must be described in sufficient detail so that all parties may adequately establish the type of services required to accomplish the work. Avoid generic statements of work.
3. All parties are advised that some of the services may not be required and that the sponsor reserves the right to initiate additional procurement action for any of the services included in the initial procurement.
4. The services are limited to those projects that can reasonably be expected to be initiated within five (5) years of the date the initial contract is signed by the consultant. With the understanding that not all projects can be foreseen, with mutual agreement between the sponsor and the FAA, new projects may be added after the original selection is made. Otherwise, sponsors that want to add projects not included in the original procurement action must conduct a separate and new procurement action.
5. If more than one party is selected, the expected projects to be performed by each party must be defined, together with the statement of work and the required services, at the time of the initial procurement action. The sponsor must provide notification to each firm of the projects they were awarded. Sponsors must avoid the practice of selecting multiple firms and assigning project responsibility at a later date.
6. The negotiation of the fee is limited to the services expected to be performed under the first grant or project after the initial procurement action. The contract must be limited to the services covered by the negotiated fee. The negotiation of the fee for subsequent services, i.e., services included in the procurement action but not in the initial contract, must occur at the time those services are needed. A fee estimate must be performed for each of these negotiations. (See paragraph 2.12 for information on fee estimate.) If a fee cannot be agreed upon between the sponsor and the selected firm, then negotiations are terminated with that firm. If the sponsor identified and ranked multiple firms for the project at the time of the initial procurement action, then the sponsor may enter into negotiations with the firm ranked next. If no additional firms were identified and ranked or agreement is not reached with any selected firms, then the sponsor must initiate a new procurement action.

7. In the case of an unforeseen project as in Paragraph 4, the Sponsor and the FAA may mutually agree on the ranking of the selected consultants by evaluating their capabilities and the scope of the unforeseen project. However, if the scope of the unforeseen project does not match the capabilities of the selected consultants, a new procurement action must be conducted.

2.6.3 Unless there is a convincing reason to combine eligible and ineligible projects in a single solicitation, sponsors are discouraged from doing so (Order 5100.38).

2.7 Selection Criteria.

2.7.1 Based on the proposed scope of service(s) and prior to evaluating consultants, a sponsor(s) must develop a list of selection criteria to be used in evaluating potential consultants. Numerical rating factors (ranges) should be assigned to each criterion on the basis of the sponsor's priorities and conception of the importance of each factor in the attainment of a successful project. The sponsor(s) should include the criteria with a Request for Qualifications (RFQ) in advance of the selection process.

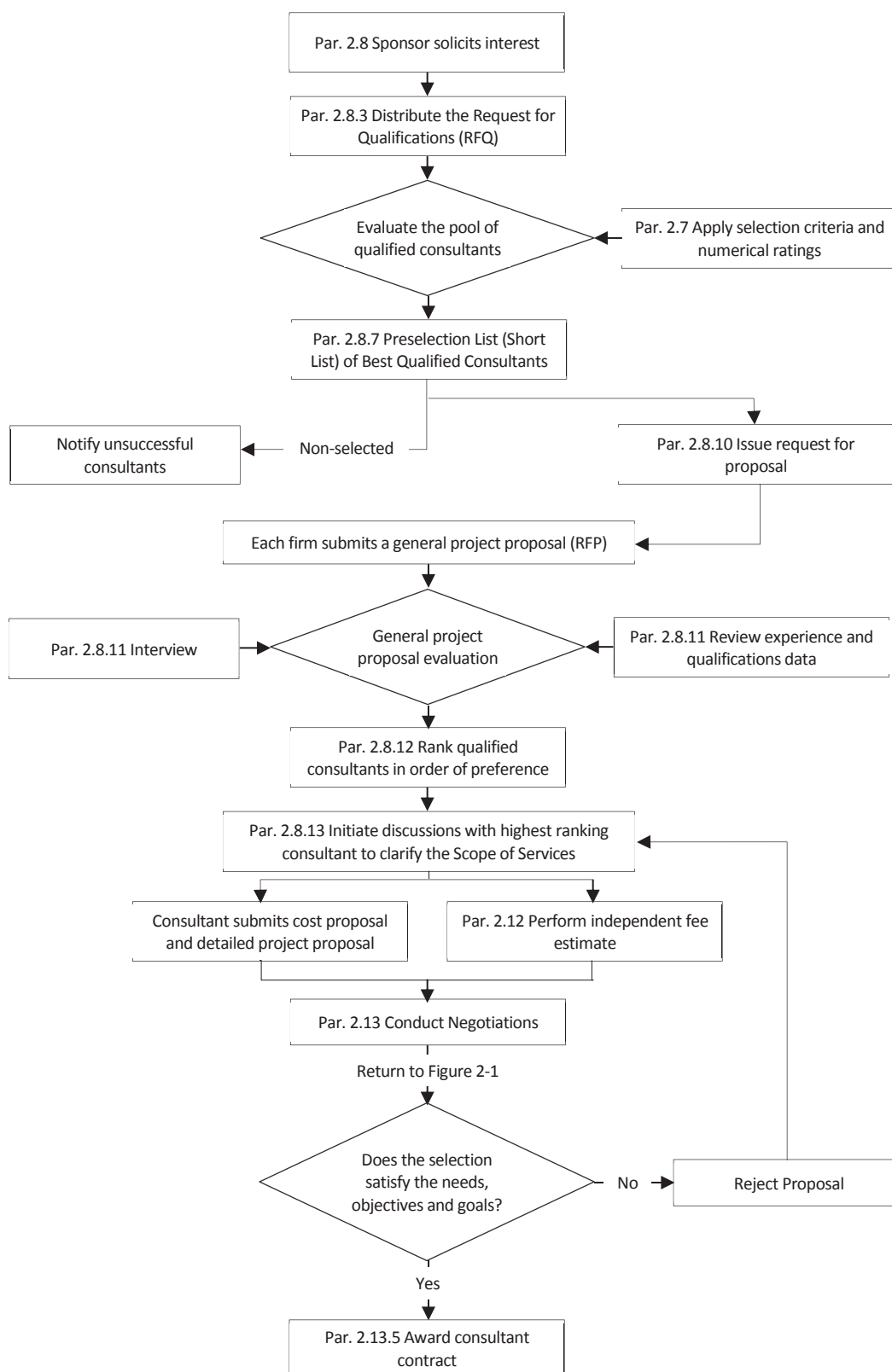
2.7.2 Based on a sponsor's goals/objectives for each project, the list of selection criteria will vary for each RFQ and must be appropriate for the proposed scope of services. Suggested selection criteria include, but are not limited to, the following:

1. Capability to perform all or most aspects of the project and recent experience in airport projects comparable to the proposed task.
2. Key personnel's professional qualifications and experience and availability for the proposed project; their reputation and professional integrity and competence; and their knowledge of FAA regulations, policies, and procedures.
3. Capability to meet schedules or deadlines.
4. Quality of projects previously undertaken and capability to complete projects without having major cost escalations or overruns.
5. Qualifications and experience of sub-consultants regularly engaged by the consultant under consideration.
6. Capability of a branch office that will do the work to perform independently of the home office, or conversely, its capability to obtain necessary support from the home office. The use of geographic location may be a selection criteria provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.
7. Ability to furnish qualified inspectors for construction inspection if applicable.
8. Understanding of the project's potential challenges and the sponsor's special concerns.
9. Degree of interest shown in undertaking the project and their familiarity with and proximity to the geographic location of the project.

10. Capability to incorporate and blend aesthetic and architectural concepts with the project design while accomplishing the basic requirements that transportation facilities be functional, safe, and efficient.
11. In meeting the Disadvantaged Business Enterprise (DBE) contract goal, evidence documenting that the consultant met the DBE goal, or by documenting that it made adequate good faith efforts to meet the DBE goal. (See 49 CFR, § 26.53)
12. Capability to conduct a Value Engineering (VE) study for projects that are particularly complex or have unique features. Order 5100.38, Chapter 3, Subsection 3-57; AC 150/5300-15, *Use of Value Engineering for Engineering and Design of Airport Grant Projects*; and AC 150/5370-10, *Standards for Specifying Construction of Airports*, contain additional guidance on VE studies.

2.8 Selection Procedures.

The sponsor must use the following selection procedures or equivalent State/sponsor qualifications based selection for individual project selections involving Federal airport grants (see Figure 2-1 and Figure 2-2). However, the requirement for both an RFQ and an RFP should be evaluated based on the complexity of the project as these steps may be combined into a single request.

Figure 2-2. Consultant Selection Process for a Single Project

- 2.8.1 The selection board should review the nature of the proposed project and the general scope of services to be procured in order to ensure an understanding of the project requirements and the qualifications needed by the consultant.
- 2.8.2 As discussed in paragraph 2.7, the selection board must develop the selection criteria and the evaluation system used in preparing a pre-selection short-list of consultants who are best qualified for the project as well as in determining the final selection.
- 2.8.3 To obtain experience and qualification data from potentially qualified consultants, the sponsor should issue an RFQ inviting consultants to submit their experience and qualifications data relating to the proposed project usually in the form of a Statement of Qualifications (SOQ). To ensure the broadest publicity concerning sponsor interest in obtaining consultant services, public announcements for all projects should be advertised in local newspapers with a wide circulation, national trade journals and magazines, and through electronic media. Public announcements should include information such as a description of the proposed project and its location, a description of the services, and the estimated range of construction costs. The public announcement should allow sufficient time for submission of the statement of qualifications.
- 2.8.4 Sponsors may also send the public announcements directly to known, potentially qualified consultants to determine their interest in the project and to request their experience and qualification data.
- 2.8.5 Affirmative steps pursuant to 2 CFR §200.321 and good faith efforts should be taken to assure that small and minority firms are used whenever possible, consistent with 49 CFR part 26. These steps and efforts should include, but not be limited to, the following:
1. Include qualified small business and minority firms on solicitation lists.
 2. Assure that small business and minority firms are solicited whenever they are potential sources. Consultation with regional Airports Divisions, Office of Civil Rights, and/or State transportation offices is encouraged.
 3. Divide the total requirements into small tasks, when economically feasible, to permit maximum small business and DBE firm participation.
 4. Use the services and assistance of the Small Business Administration, the Minority Business Development Agency of the Department of Commerce, and the Minority Resource Center Regional Centers of the Department of Transportation (<http://osdbu.dot.gov>).
 5. Arrange solicitations, time for presentation of offers and delivery schedules to facilitate DBE and other small business participation.
 6. Encourage consultants to subcontract portions of the work, even when they might otherwise perform the work with their own forces.
- 2.8.6 FAA Airports field offices may also furnish the names of consultants who have engaged in projects of similar nature in their areas of jurisdiction. However, with the exception

of an EIS, FAA personnel will not recommend consultants or participate in the selection process. The addresses of FAA Airports Regional/District Offices having jurisdiction over specific geographic areas are available at:

http://www.faa.gov/airports/news_information/contact_info/regional/

- 2.8.7 From the experience and qualification data obtained from consultants, the selection board should prepare a pre-selection short-list of the best qualified consultants for further consideration. With adequate response to the RFQ, the typical pre-selection short-list should consist of between three and five consultants.
- 2.8.8 At this point, consultants who expressed an interest in the project but were not included on the pre-selection short-list should be notified that they were unsuccessful.
- 2.8.9 Detailed information on the qualifications and performance data of each of the consultants on the pre-selection short-list should be obtained. This can be achieved by contacting former clients identified by the consultant in their statement of qualifications to ascertain the quality of work, ability to meet schedules, cost control, and consultant-client relationship.
- 2.8.10 At this point, the selection organization may elect to obtain a general project proposal from each of the firms on the pre-selection short-list, typically by issuing a Request for Proposal (RFP) to each consultant on the pre-selection short-list. The RFP should include a detailed description of the project and the proposed scope of services required. The selection criteria, including their relative importance that will be used to evaluate the proposals must also be made available to each of the firms on the pre-selection short-list. The RFP shall not contain a request for any cost information, such as total cost, cost per hour, work hours, or other pricing data. Requests for cost or pricing information, prior to discussions with the best qualified firm, to define the scope of services is contrary to 49 USC § 47107 (a) (17) and 2 CFR § 200.320(d). The general project proposal will help the selection board recommend a consultant who can achieve design excellence, while successfully controlling time and costs and who has the ability to understand and accomplish the specialized requirements of the project. The elements of a typical general project proposal should include, but are not limited to, the following:
 1. Team members, other key personnel, previous experience, and the role they will fill on the project. The qualifications and time commitment of the project manager proposed for the project.
 2. Current workload.
 3. Proposed project schedule, including major tasks and target completion dates.
 4. Technical approach – a brief discussion of the tasks or steps that the consultant will take to accomplish the work described in the scope of services.
 5. Value engineering – when a value engineering study is included in the selection criteria, a brief discussion of the consultant’s capability, training, and experience to carry out such a study.

- 2.8.11 Conduct interviews with each consultant on the pre-selection short-list. On small projects, a telephone interview may be sufficient. Careful consideration of time and cost should be given to the need for formal interviews. If sponsor has received sufficient information included in the qualification submission to make a selection, then formal interviews may not be necessary.
- 2.8.12 Review the experience and qualifications data, the general project proposal, the interview results, and other relevant data. Using the selection criteria developed for the project; rank the qualified consultants in order of preference.
- 2.8.13 Initiate discussion with the first-ranked consultant to fully define the scope of work and services to be provided (see paragraph 2.11). After agreement on a detailed scope of services has been reached, the consultant should submit their cost proposals together with a detailed project proposal. Negotiations should then be conducted to reach a fair and reasonable fee, subject to the procedures indicated in paragraphs 2.12 and 2.13.
- 2.8.14 Prepare a report that documents the Sponsor's procurement actions and the selection of the consultant they deem most qualified. The report must contain sufficient detail to indicate the extent of the review and the considerations used for the recommendations. The report should be forwarded to the sponsor's administrator or governing body authorized to review the recommendations of the selection board. The recommendations of the selection board should normally be accepted unless the report does not adequately support the recommendations. This will help to ensure complete fairness and open competition. If the recommendations are not accepted, the selection board should reconvene until acceptable recommendations have been agreed upon.

2.9 **Alternate Selection Procedures.**

2.9.1 Proposals Requested with Qualification Data.

The selection procedure recommended in paragraph 2.8 should normally be followed in the procurement of consulting services. For small projects where the scope of work and services can be clearly defined or the sponsor anticipates receipt of less than four proposals, the sponsor may wish to solicit proposals at the time of advertising for experience and qualification data. In this case, the announcement must contain a detailed scope of services and indicate where the selection criteria can be obtained. The advertisement cannot request pricing information.

2.9.2 Informal Procedures.

- 2.9.2.1 Informal Qualifications Based Selection procedures may be used for A/E procurements estimated to be less than \$100,000. However, this does not relieve the sponsor from the obligation to perform a cost analysis and prepare an independent fee estimate (see paragraph 2.12). Sponsors must consult with FAA Airport personnel before using informal procedures to assure that the circumstances justify their use.

2.9.2.2 Under this procedure, a sponsor must contact at least three firms and discuss their qualifications to perform the work. Negotiations must then be conducted with the best-qualified firm to arrive at a fee. These negotiations may be conducted via telephone or e-mail. After selection, using this procedure, the sponsor must document their procurement action and then submit a statement to the FAA explaining the basis for the selection and method used to determine reasonableness of the fee.

2.9.2.3 The informal selection process may not be used to select a firm for multiple projects.

2.9.3 Non-competitive Procedures.

The FAA may authorize non-competitive negotiation for services if the cost of the contract is not expected to exceed \$10,000 and the services are incidental to the grant project. When this procedure is used, the sponsor must submit a statement to the FAA explaining the basis used to determine reasonableness of cost as discussed in 2.9.2 above.

2.10 **Selection Procedures for Environmental Impact Statement (EIS) Preparation.**

The procurement of consultant services to assist the FAA in preparing an EIS is somewhat unique because the regulations implementing the National Environmental Policy Act (NEPA) (42 USC § 4321 et seq.), require Federal agencies to prepare the EIS or select the contractor that prepares the EIS (Orders 5050.4 and 1050.1 provide additional guidance). Selection of a consultant must, therefore, be made by the FAA from a short-list of qualified consultants submitted by the sponsor. The sponsor and the FAA must follow the selection procedures recommended in paragraph 2.8 with the following exceptions:

1. The proposed scope of work is to be provided by the FAA.
2. The FAA must concur with the selection and evaluation criteria prepared by the sponsor.
3. The FAA will be invited to participate with the sponsor in the interviews with consultants on the pre-selection short-list.
4. The sponsor may indicate to the FAA their ranking of the consultants on the pre-selection short-list after the interview process has been concluded. The FAA, however, is under no obligation to make a selection based on this ranking.
5. Using the previous sponsor/FAA agreed upon selection and evaluation criteria, the FAA will independently evaluate and rank the consultants on the pre-selection short-list in order of preference, based on qualifications.
6. The FAA must advise the sponsor of the FAA's ranking in order of preference, and the sponsor must advise and initiate discussions with the consultant ranked first.
7. The FAA will be invited to discussions on the scope during any IFE process conducted by the Sponsor or their consultant, as necessary.

8. The FAA's involvement in the negotiation of the project cost must be limited to making a reasonableness determination once a satisfactory cost proposal has been reached between the sponsor and the consultant.
9. The FAA must prepare a selection report for its records.

2.11 **Scope of Services.**

- 2.11.1 An important step in the negotiation process is to reach a complete and mutual understanding of the scope of services to be provided. The general scope of services developed during initiation of the procurement process is of necessity too broad to serve as the basis for a contractual agreement. A well-defined project description and scope of services should be developed between the sponsor and first-ranked consultant prior to negotiating a project design fee. This may be accomplished in a scoping meeting or separate investigation or study to clearly define the extent of the project. The sponsor's engineer or independent consultant (see paragraph 2.12) should attend the meeting so they will have a complete understanding of the scope of services prior to developing a detailed fee estimate. Such a meeting offers the opportunity for refinement, amendment, and complete definition of the services to be rendered.
- 2.11.2 The scope of service(s) must be sufficiently detailed so that the consultant can make a reasonable fee estimate (see Appendix E). Although the scope of service(s) will vary from project to project (see samples in Appendix C), the following items are typical of those that should be considered in developing the scope of services:
 1. List of meetings the consultant is expected to attend.
 2. Design schedule.
 3. Special services required.
 4. Complexity of design.
 5. Safety and operational considerations.
 6. Environmental considerations.
 7. Survey and geotechnical testing requirements.
 8. Sponsor representation services during construction.
 9. Quality control during construction.
 10. Preparation of forms, letters, documents, and reports.
 11. Airport Layout Plan updates.
 12. Property map preparation.
 13. Quality control during design.
 14. Coordination with other consultants and agencies.
 15. Deliverables.
 16. Data and material furnished by the sponsor.

17. Testing and commissioning requirements.
18. City/county requirements.
19. Number of bid packages.
20. Complexity of construction phasing to minimize impacts on airport operations.
21. Public Outreach.

2.12 **Independent Fee Estimate.**

- 2.12.1 A sponsor must perform a price or cost analysis for every A/E contract (2 CFR § 200.323). The method and degree of analysis is dependent on the facts surrounding the contract. To properly evaluate the cost of professional services an independent fee estimate (IFE) is required, prior to receiving the consultant's proposal, as part of the cost analysis for all A/E contracts and contract modifications. The word "independent" does not imply that the IFE has to be performed by someone other than the sponsor. Preparation of an IFE can be completed in a number of ways, such as the following, or as approved by your local ADO:
 1. A sponsor having a staff with experience in estimating the professional services and negotiating contracts for these services can develop its own IFE for the services, based on the scope of services agreed upon in paragraph 2.11.
 2. Sponsors having no staff with this expertise or having minimal or no previous experience may engage the services of a consultant on retainer for preparation of the IFE provided the consultant has experience with the services involved and who is not being considered for the project.
 3. Alternatively, an independent engineering, architecture, or planning consultant may be retained to prepare an IFE provided this consultant was not on the pre-selection short-list. The consultant must have recent experience in airport work similar to that proposed and be familiar with FAA requirements and procedures. The sponsor should request evidence that the consultant meets the above requirements.
- 2.12.2 State aviation personnel who have experience with the services involved may also prepare the IFE for the sponsors use.
- 2.12.3 The level of detail needed to satisfy the requirements of an IFE varies and is dependent on the anticipated value of the A/E contract. For contracts with an anticipated value less than \$100,000 the sponsor can satisfy the IFE requirement by comparing the A/E contract with previous contracts of a similar nature, or preparing a detailed fee/cost analysis (see Appendix E). At a minimum, the independent estimate must address direct labor work hours, labor rates, general and administrative overhead, non-salary expenses and a reasonable profit. For contracts anticipated to be greater than \$100,000 a detailed fee/cost analysis is required.
- 2.12.4 If the sponsor hires a consultant to perform any of these functions, that consultant may be retained using informal or non-competitive qualifications based procedures (see

paragraphs 2.9.2 and 2.9.3) as applicable; however, the IFE consultant will not be eligible for consideration to perform work on the project.

2.12.5 Another source on estimating consultant's cost can be found in ASCE Manuals and Reports on Engineering Practice No. 45, "How to Work Effectively with Consulting Engineers." However, these graphs must be used with judgment and within their stated limitations. Other resources include project history files, previous contracts, etc.

2.12.6 Sponsors have an obligation to obtain a fair and reasonable fee in all cases. Prior to initiating further discussions with the first-ranked consultant, the sponsor must accept the IFE and retain it for their records. Appendices D and E present sample formats for consultant services fee/cost and detailed fee/cost analysis respectively, however any format that meets this purpose is acceptable. The FAA retains the right to disallow negotiated fees that the FAA determines to be unreasonable.

2.13 **Negotiations.**

2.13.1 After developing a detailed scope of services and after the IFE requirements have been satisfied per Par. 2.12, the sponsor may enter into negotiations with the consultant given first preference by the selection board. Once the rankings have been established, the sponsor shall inform the other firms on the pre-selection shortlist that negotiations have been initiated with the first ranked firm. If an independent firm has been retained by the sponsor for the purpose of preparing an independent fee estimate, the firm may be consulted by the sponsor during negotiations, to clarify problem areas, but not to review the consultant's fee proposal or attend any negotiating sessions.

2.13.2 Based on the scope of services agreed upon in paragraph 2.11, the sponsor must request the consultant to submit the proposed fee and supporting cost breakdown. The consultant must prepare a detailed estimate of the hours and cost required for each of the major tasks. In addition to charges for labor, the consultant should, if appropriate, indicate the costs for subcontractors, travel, living expenses, reproduction, and other out-of-pocket expenses expected to be incurred.

2.13.3 When evaluating the reasonableness of a consultant's fee proposal, a general review standard used within the FAA and industry is whether the total fee proposal, as well as individual tasks within the proposal, is within 10% of the IFE. When differences exceed 10%, the sponsor and IFE preparer should review those areas with the consultant to determine if there is a misunderstanding of the scope of services or level of effort required to complete the work. While this should not be construed as policy, the use of the 10% standard is one method to help identify areas of significant difference between the consultant's fee proposal and the IFE.

2.13.4 Negotiations should be based upon the data submitted by the consultant and an evaluation of the specific work hours required for each task. The sponsor should subject the consultant's data to a technical/engineering analysis. Based on this analysis, the sponsor should identify differences in the work-hour estimates. Significant differences, either positive or negative, between the estimate submitted by the

consultant and the estimate developed by the sponsor should be resolved, and revisions should be made to the work hours or scope of services as required. The fee should then be evaluated, taking into consideration the experience level required by the engineer working on each task. A sample fee/cost analysis form is shown in Appendix E.

- 2.13.5 If a mutually satisfactory contract cannot be negotiated with the first-ranked consultant, the negotiations must be terminated and the consultant notified. Negotiations must then be initiated with the consultant given second preference by the selection board. This procedure must be continued with recommended consultants in the sequence of ranking established by the selection board until a mutually satisfactory contract has been negotiated. Once negotiations have been terminated with a firm and begun with another, they cannot be reopened with the former firm.
- 2.13.6 A record of negotiations must be prepared by the sponsor and included in the contract file. This record must contain sufficient detail to reflect any changes in the scope of services controlling the establishment of the cost and other terms of the contract. An explanation must be provided for any significant differences between the sponsor's original estimate and the final fee agreed upon. The scope of services, draft contract, sponsor's independent fee estimate, consultant's fee proposal with any revisions, and detailed fee analysis must be attached to the report. A sample Record of Negotiations is contained in Appendix F.
- 2.13.7 Upon completion of successful negotiations, all consultants interviewed by the selection board should be informed of the consultant selected for the project.
- 2.13.8 FAA personnel will not be present and will not participate in the negotiation process. The FAA's role is to make a judgment on the reasonableness of the compensation for the services to be furnished and to ensure that all services required for a particular project have been included in the proposal.
- 2.13.9 If requested by the FAA, the sponsor must submit the record of negotiations and all attachments to the FAA for a reasonableness of cost determination (Order 5100.38, Chapter 3, Section 14).

2.14 **Sponsor Force Account Projects.**

Proposals to accomplish airport engineering with the sponsor's own personnel or by its agent must be approved by the FAA. Proposals must be submitted in writing and subjected to a review similar to that for engineering contracts. Most of the factors considered in the selection of a consultant would be applicable to approval of services to be done by force account. The sponsor's proposal to use force account rather than contract-engineering services must be fully documented and should contain as a minimum:

1. Justification for doing the work by force account rather than by contract;
2. Estimate of costs, including detailed data on estimated work hours, hourly rates, non-salary expenses, and indirect costs;

3. Names and engineering qualifications of personnel that will be accomplishing specific tasks;
4. Statements concerning the capability of the sponsor to perform the various tasks of design, supervision, inspections, testing, etc., as applicable to the project with arguments to support the decision to use force account;
5. Summary of sponsor's experience with airport engineering pertaining to projects with similar design scopes; and
6. Statement by the sponsor on the ability of its personnel to integrate the project into their workload, with a schedule of accomplishment of tasks, date by which the work will be completed, or dates within which it will take place.

Tsang, Tiffany (DPW)

From: dhr-psccordinator@sfgov.org
Sent: Tuesday, March 22, 2016 12:03 PM
To: amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Tsang, Tiffany (DPW); Camillo, Stacey (DPW); Isen, Richard (TIS)
Subject: Notice of Civil Service Action – PSC # Civil Service: 41026 - 15/16 -- 01/11/2016

The Commission adopted the following action at its meeting of March, 7, 2016:

Approved by Civil Service Commission of PSC# 41026 - 15/16, with no conditions with notice to the Office of the Controller and the Office of Contract Administration.

<http://apps.sfgov.org/dhrdrupal/node/6286>

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-Needed Architectural Design Services

Funding Source: Departmental Work Orders

PSC Amount: \$10,000,000

PSC Est. Start Date: 03/01/2016

PSC Est. End Date 03/01/2022

1. Description of Work

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

Architectural services on an as-needed basis, for public building projects including but not limited to master plans, environmental reviews, programming and planning studies, assessments of existing facilities, green building evaluations, utility studies, design drawings, specifications, cost estimates, project schedules, adaptive re-use of existing facilities, modifications to life safety systems and other infrastructure, and new facilities. We intend to award 2 as-needed contracts with Federal Transit Administration (FTA) federal procurement requirements for San Francisco Municipal Transportation Agency (SFMTA) projects and 3-4 contracts for Public Works with local procurement requirements.

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

The as-needed contracts will only be utilized when Public Works cannot provide the services in a timely manner due to unavailability of staff or when specialty services are required. If services cannot be provided in a timely manner the City's ongoing operations will be impacted and thereby cause delays to the provision of services necessary for the public interest.

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 service has been provided in the past through PSC 4095-09/10.

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.

Public Works' as-needed contract durations cannot exceed 5 years. The duration of this PSC exceeds 5 years to account for additional time for advertising, evaluations, and negotiations prior to award of a contract.

2. Reason(s) for the Request

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

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

☒ Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

This service will only be required on an as-needed basis when either City staff don't have the capacity to fulfill all project requests, causing delays, or if specialized services are required. Certain federal or state grants require utilization of specialized contract services.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Professional architectural services typically required for building projects in the public sector; services of licensed sub-consultants with expertise including but not limited to the following disciplines: historic preservation, civil, structural, electrical, mechanical/plumbing, resource efficiency with availability

of Leadership in Energy & Environmental Design (LEED) Accredited Professionals, LEED Compliance, elevator, fire protection, code compliance, waterproofing, roofing, landscape architecture, and facilities' furnishings/ interior design.

B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5215, Fire Protection Engineer; 5218, Structural Engineer; 5219, Senior Structural Engineer; 5260, Architectural Assistant 1; 5261, Architectural Assistant 2; 5262, Landscape Architect Assoc 1; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5272, Landscape Architect Assoc 2; 5274, Landscape Architect;

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?

Department has recruited and hired more people for above civil service classes. As-needed contract services will only be utilized when and if the work cannot be prudently performed by internal staff.

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

A. Explain why civil service classes are not applicable.

These are as-needed contract services only. They will only be utilized when the following conditions exist: • The Bureau is working at full capacity and postponement of pending projects would be contrary to the public interest. • Specialized services are required that are not available internally and for which there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

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 only going to be utilized 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 contract? If so, please explain what that will entail; if not, explain why not.
No training is needed since this service will only be utilized when the Bureau is working at full capacity and postponement of pending projects would be contrary to the public interest, or specialized services are required that are not available internally.

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.
As there will be a few Federal contracts procured for this service, we will not be able to implement Local Procurements, according to FTA Circular 4220.1F Chapter II,2.a. (1)(a): "States. When procuring property and services under a grant or cooperative agreement, a State may use the same procurement policies and procedures that it uses for acquisitions not financed with Federal assistance. At a minimum, the State must comply with the federally mandated requirements on contract term limitations for revenue vehicle purchases, competition, prohibitions against geographic preferences, procurement of architectural engineering (A&E) services, and awards to responsible contractors. The State must also ensure that each purchase order and contract financed with FTA assistance includes all provisions required by Federal statutes and their implementing regulations." FTA Circular Website:
http://www.fta.dot.gov/legislation_law/12349_8641.html

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.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Mission Bay North and South Financial Consultation Services

Funding Source: Office of Community Infrass and Investment

PSC Amount: \$3,000,000

PSC Est. Start Date: 01/31/2021

PSC Est. End Date 12/31/2026

1. Description of Work

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

Services are for financial consulting in facilities acquisition in conjunction with Mission Bay Development - Community Facilities Districts Nos 4 & 6 (CFD #4 & #6). The Consultant's principal responsibilities will be to advise San Francisco Public Works (SFPW) on the interpretation of existing agreements with Developer, the determination of reimbursements, the settling of cost allocation and acquisition reimbursement protocols.

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

Mission Bay Development's Disposition and Development Agreement and Acquisition Agreement obligate San Francisco Public Works (SFPW) to review and approve acquisition reimbursement applications submitted by the developer. Denial of the request would potentially result in inappropriate approvals and disbursements of Redevelopment Bond Funds - Community Facility District (CFD) #4 & 6.

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.

A contract with Harris & Associates, Inc was approve by PSC 4120 - 05/06 and PSC 4113 - 04/05 (please see attachment uploaded in the "Prior or Similar Approved PSC" section) on June 20, 2005 for similar services for the Hunters Point Shipyard Phase One Improvement - Community Facility District (CFD) # 7.

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 additional time in the PSC Duration is to allow for any delays in processing and awarding the contracts. The original contract will not exceed a 5-year term.

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:

Short-term or capital projects requiring diverse skills, expertise and/or knowledge: The specialty requires a combination of knowledge, experience and comprehensive understanding in development engineering, financial and audit analysis, and legal analysis and interpretation. Services required on an as-needed, intermittent, or periodic basis: Projects requiring these specialized skills occur only periodically. Developments requiring financial services for acquisition of facilities are unusual and intermittent. Also, the work load is periodic and erratic due to the developer's construction schedule in response to changing economic conditions and due to the inconsistent availability of special tax levy's known as Community Fund District (CFD) funds. Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible: The availability of Development CFD Bond funds depends on the property tax assessment and is unpredictable on a long term basis and inconsistent due to changing economic conditions.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Experience in establishing, reviewing and interpreting public finance district and acquisition agreements, experience and availability of cost estimators and personnel to review construction design and related costs, and reimbursement applications. Key personnel should have a minimum of five years of experience.

B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer;

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?

Department has recruited and hired people for above civil service classes. Contract services for work that cannot be prudently performed by internal staff.

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

A. Explain why civil service classes are not applicable.

Civil Service classifications are applicable but City personnel do not have the required expertise or experience.

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. Civil Service classification already exists. It would not be practical to adopt new civil service classes, as the request for this type of service is only periodic. On-going capital development projects requiring financial services for acquisition of facilities are unusual and intermittent. The amount of work requested by the developer is usually erratic and unpredictable.

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 contract? If so, please explain what that will entail; if not, explain why not.

No. No training is anticipated. Zero hours. Since these services are only going to be utilized on an as-needed, intermittent, or periodic basis.

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. Union Notification: On 11/18/2020, 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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44043 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Sy, Don (DPW)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
Sent: Wednesday, November 18, 2020 4:47 PM
To: Burns, Alexander (DPW); 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; Sy, Don (DPW); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44043 - 20/21

RECEIPT for Union Notification for PSC 44043 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 44043 - 20/21 for \$3,000,000 for Initial Request services for the period 01/31/2021 – 12/31/2026. 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/15750> 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)



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR

May 17, 2006

NOTICE OF CIVIL SERVICE COMMISSION ACTION

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED
PERSONAL SERVICES CONTRACT NUMBERS 4111-05/06
THROUGH 4122-05/06; 4072-05/06; 4112-02/03; 4114-02/03 AND
4127-02/03.

LINDA RICHARDSON
PRESIDENT

THOMAS T. NG
VICE PRESIDENT

ALICIA D. BECERRIL
COMMISSIONER

DONALD A. CASPER
COMMISSIONER

MORGAN R. GORRONO
COMMISSIONER

KATE FAVETTI
EXECUTIVE OFFICER

At its meeting of May 15, 2006 the Civil Service Commission had for its consideration the above matter.

It was the decision of the Commission to adopt the Human Resources Director's report. Notify the offices of the Controller and the Purchaser. (The Department of Public Health to report the second meeting of May 2007 on the status of PSC #4116-05/06.)

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

CIVIL SERVICE COMMISSION

KATE FAVETTI
Executive Officer

Attachment

- c: Jesusa Bushong, San Francisco Fire Department
Gordon Choy, Department of Public Works
Eugene Clendinen, District Attorney
Philip Ginsburg, Human Resources Director
Elizabeth Jacobi, Department of Human Resources
Kathy Mallegni, Port Commission
Jonathan Nelly, Department of Human Resources
Anne Okubo, Department of Public Health
Lee Okumoto, Public Utilities Commission
Marc Rosaaen, Department of Telecommunications
Jeannie Wong, Office of the Controller
Commission File
Chron

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CONTRACT ADMINISTRATIONS

**POSTING FOR
May 15, 2006**

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

PSC No.	DeptNo	DeptName	Approval Type	Contract Amount	Description of work	Duration
4119-05/06	09	Controller's Office	Regular	\$350,000.00	Will conduct local sales and use tax audits of State Board of Equalization records and provide legislative analyses, identify and correct sales and use tax allocation errors, and develop and maintain a database of sales tax information.	30-Jun-11
4120-05/06	90	Public Works	Regular	\$900,000.00	Will provide financial consulting services in facilities acquisition in conjunction with Mission Bay Development-Community Facilities District No. 4 & 6.	14-Aug-11
4121-05/06	75	Telecommunications & Information Services	Regular	\$275,000.00	Will install backup radio receiver-transmitter for 800 MHZ and DPW radio systems and provide contract administration, contract design review, training, audit and acceptance testing.	30-Nov-06
4122-05/06	04	District Attorney	Regular	\$90,000.00	Will provide services to women and transgender individuals who have experienced sexual exploitation and violence.	30-Jun-07

CCSF: DHR
PSCPSTNG



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR

PSC# 4120 - 05/06 - Mission Bay
mod

April 8, 2010

NOTICE OF CIVIL SERVICE COMMISSION ACTION

MORGAN R. GORRONO
PRESIDENT

E. DENNIS NORMANDY
VICE PRESIDENT

DONALD A. CASPER
COMMISSIONER

MARY Y. JUNG
COMMISSIONER

ANITA SANCHEZ
EXECUTIVE OFFICER

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBERS 1001-09/10 THROUGH 1003-09/10; 4108-09/10 THROUGH 4120-09/10; 4135-05/06; 4096-07/08; 4019-07/08; 4161-08/09 AND 4120-05/06.

At its meeting of April 5, 2010 the Civil Service Commission had for its consideration the above matter.

PLEASE NOTE:

It is important that a copy of this action be kept in the department files as you will need it in the future as proof of Civil Service Commission approval. Please share it with everyone responsible for follow-up.

It was the decision of the Commission to:

- (1) Postpone PSC #s4114-09/10, 4019-07/08 and 4161-08/09 to the meeting of April 19, 2010 at the request of the Public Utilities Commission.
- (2) Postpone PSC #4113-09/10 to the meeting of April 19, 2010 at the request of IFPTE Local 21.
- (3) Approve request for PSC #4108-09/10 on the condition that the Art Commission meet with representatives of SEIU Local 1021 to discuss its concerns regarding SEIU work to be performed at the San Francisco International Airport. Notify the offices of the Controller and the Office of Contract Administration.
- (4) Approve request for PSC #4109-09/10 on the condition that the Airport Commission and IFPTE Local 21 meet to discuss issues of concern to IFPTE Local 21. Notify the offices of the Controller and the Office of Contract Administration.
- (5) Approve request for all remaining contracts. Notify the offices of the Controller and the Office of Contract Administration.

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

CIVIL SERVICE COMMISSION

Anita Sanchez
ANITA SANCHEZ
Executive Officer

Attachment

c: Sheila Arcelona, District Attorney
Cynthia Avakian, Airport Commission
Parveen Boparai, Municipal Transportation Agency
Micki Callahan, Human Resources Director
Gordon Choy, Department of Public Works
Maureen Gannon, Sheriff's Department
Kendall Gary, Department of Technology
Jacquie Hale, Department of Public Health
Lavena Holmes-Williams, Port Commission
Kan Htun, Arts Commission
Shamica Jackson, Public Utilities Commission
Naomi Kelly, Office of Contract Administration
Florence Kyaun, Public Utilities Commission
Sean McFadden, Recreation and Parks Department
Mary Ng, Department of Human Resources
Ben Rosenfield, Controller
Commission File
Chron

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4/5/2010

PROPOSED PERSONAL SERVICES CONTRACTS MODIFICATION TO INCREASE CONTRACT AMOUNT/DURATION

DeptNo	PSC No	DeptDescription	Approval Type	Change	Contract Amount	Description of Work	Duration
40	4161-08/09	Public Utilities Commission	Modification	\$2,000,000	\$5,000,000	Will provide preliminary engineering design and cost estimates with additional environmental and permitting support services for a Newark to San Francisco submarine High Voltage Direct Current (HVDC) power cable. Design work will include substation sites and transmission routes from the existing Newark Substation to a new substation on or near Treasure Island with additional possible connections in the Greater Bay Area. Environmental work includes preparation of CEQA documents, environmental background reports and permit applications. Coordination and work plan preparation; environmental document scoping; environmental background and field studies; alternatives analysis; preparation of draft environmental documents; public review of public comments; preparation of final environmental documents; and mitigation monitoring plan preparation.	8/15/2014
90	4120-05/06	Public Works	Modification	\$6,000,000	\$7,349,000	Will provide services for financial consulting in facilities acquisition in conjunction with Mission Bay Development-Community Facilities District No. 4 & 6 (CFD #4 & 6). Modification request due to the need to provide public infrastructure much faster than anticipated (in response to market conditions,) the developer completed substantially more projects than planned in 2006-2009. Thus, the developer submitted considerably more submittals for review in the past several years and is anticipating the number and complexity of the submittals for review to increase two to three times in the next few years.	5/14/2015

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CCSF: DPW PCSCP Posting





CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

June 22, 2005

GAVIN NEWSOM
MAYOR

NOTICE OF CIVIL SERVICE COMMISSION ACTION ACTION

**SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED
PERSONAL SERVICES CONTRACT NUMBERS 4112-04/05
AND 4113-04/05.**

LINDA RICHARDSON
PRESIDENT

THOMAS T. NG
VICE PRESIDENT

ALICIA D. BECERRIL
COMMISSIONER

DONALD A. CASPER
COMMISSIONER

MORGAN R. GORRANO
COMMISSIONER

KATE FAVETTI
EXECUTIVE OFFICER

At its meeting of June 20, 2005 the Civil Service Commission had for its consideration the above matter.

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

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

CIVIL SERVICE COMMISSION

KATE FAVETTI
Executive Officer

Attachment

c: Gordon Choy, Department of Public Works
Herberth Campos, Department of Human Resources
Philip Ginsburg, Human Resources Director
Elizabeth Jacobi, Department of Human Resources
Gail Stein, District Attorney
Commission File
Chron

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POSTING FOR

June 3, 2005

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

PSC#	Department	Amount	Description of work	Type of Approval	Duration
4112-04/05	District Attorney	\$90,000	Will provide services to women and transgendered individuals who have experienced sexual exploitation and violence.	Regular	6/30/2006
4113-04/05	Public Works	\$300,000	Will provide services for financial consulting in facilities acquisition in conjunction with Hunters Point Shipyard Phase One Improvements - Community Facilities District No. 7 (CFD #7).	Regular	7/14/2007

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Specialized Technical Support for a Job Order Contracting (JOC) System for Ch. 6 Depts

Funding Source: Various projects and general fund

PSC Duration: 6 years 4 weeks

PSC Amount: \$9,000,000

1. Description of Work

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

General services to assist the City in administering a Job Order Contracting (JOC) system as provided for in San Francisco Administrative Code Section 6.62 for use in expediting the design and construction of small and/or urgent projects. Service provider will prepare specialized Unit Price Books (construction cost catalog) with regional adjustments to costs for competitive bidding, technical specifications, provide proprietary JOC management software, and training to City staff and contractors in the use of a job order contracting system.

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

The proposed services are not currently performed by City staff but are necessary to implement and maintain JOC program functions, which improve the City's responsiveness for small construction projects. Denial will result in disruption to these services, which will, in effect, disrupt functionality of any department's JOC program to be covered under this PSC.

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 service was previously provided and authorized under PSC 43023-1617, for the same services.

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.

Contract initial duration is anticipated for 5 years, however, PSC duration exceeds 5 years to account for time needed to advertise and award a contract.

2. Reason(s) for the Request

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

☒ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

This is a specialized service requiring expertise, resources, research and development of the construction cost catalog (which includes over 10,000 construction tasks), management software, and database. All City departments utilizing this professional service intend to set up an enterprise agreement. This new agreement is expected to be completed by June 2021, which will allow for uninterrupted functioning of each City agency's JOC program.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Consultant must be able to prepare a Unit Price Book containing at least 10,000 unit prices covering material and labor costs for various units of construction; adjustment of those unit costs to current market conditions; prepare and publish technical specifications for Divisions 2-16 describing the materials, performance and installation requirements for each of the construction tasks listed in the Unit Price Book including annual updating as necessary; and, in conjunction with City staff, develop and publish the Contracts and Forms; provide software to manage contracts for construction; all in accordance with the needs and requirements of the

various City departments.

B. Which, if any, civil service class(es) normally perform(s) this work? 1820, Junior Administrative Analyst; 1822, Administrative Analyst; 1824, Pr Administrative Analyst; 1840, Junior Management Assistant; 1842, Management Assistant; 1844, Senior Management Assistant; 5120, Architectural Administrator; 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5366, Engineering Associate 2; 5502, Project Manager 1; 5504, Project Manager 2; 5506, Project Manager 3;

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?

None, due to the extensive and proprietary nature of information and software provided by the current service provider.

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

A. Explain why civil service classes are not applicable.

The consultant specializes in developing this alternative, specialized contracting system. None of the Civil Service Classifications has developed such a program. Specialized expertise and extensive research are needed to provide over 10,000 unit prices for construction projects. The program, while adjusted for use by City staff, is also provided to several agencies across the nation.

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, as this is a specialized service. One civil service class would not cover the breadth of services to be performed.

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 contract? If so, please explain what that will entail; if not, explain why not.

Yes. 20-25 employees, 8 hrs/employee; Civil Service classifications: 5120 Architectural Administrator, 5502/5504/5506 Project Managers, 5211 Senior Engineer/Architect, 5174 Administrative Engineer, 5241 Engineer, 5207 Associate Engineer, 5203 Assistant Engineer, 5201 Junior Engineer, 5268 Architect, 5366 Engineering Associate, 5265/5266 Architectural Associates, 1840/1842/1844 Management Assistants, 1820/1822/1824 Administrative Analysts. Training will be on how the JOC task order is developed and used; how to review JOC task order proposals using the JOC software and Unit Price Book; and how to prepare reports and contract documents using the JOC software.

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. Union Notification: On 11/02/2020, 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; SEIU 1021 Miscellaneous; SEIU Local 1021

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

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

Address: 49 South Van Ness Ave. Suite 1600 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44551 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
To: [Burns, Alexander \(DPW\)](mailto:Burns,Alexander@DPW); sarah.wilson@seiu1021.org; thomas.vitale@seiu1021.org; Sandeep.lal@seiu1021.me; leah.berlanga@seiu1021.org; [Meyers, Julie \(HSA\)](mailto:Meyers,Julie@HSA); Ricardo.lopez@sfgov.org; [Basconcillo, Katherine \(PUC\)](mailto:Basconcillo,Katherine@PUC); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; [Poon, Sin Yee \(HSA\)](mailto:Poon,SinYee@HSA); david.canham@seiu1021.org; jtanner940@aol.com; [Laxamana, Junko \(BOS\)](mailto:Laxamana,Junko@BOS); amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmatheys@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; [Macaranas, Belle \(DPW\)](mailto:Macaranas,Belle@DPW); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator,DHR@HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44551 - 20/21
Date: Monday, November 2, 2020 10:30:07 AM

RECEIPT for Union Notification for PSC 44551 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 44551 - 20/21 for \$9,000,000 for Initial Request services for the period 05/01/2021 – 06/01/2027. Notification of 30 days (60 days for SEIU) is required.

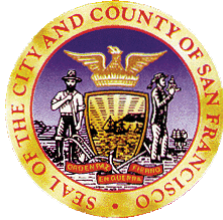
After logging into the system please select link below, view the information and verify receipt:

<http://apps.sfgov.org/dhrdrupal/node/15642> 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

Request for Proposals for CITY AND COUNTY OF SAN FRANCISCO



REQUEST FOR PROPOSAL No. 1000006940

JOB ORDER CONTRACTING IMPLEMENTATION SERVICES (CITY-WIDE)

AUGUST 2017

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I. INTRODUCTION AND SCHEDULE

Introduction

The City and County of San Francisco (City) seeks to receive proposals and retain the services of a qualified Proposer (Service Provider) to assist the City with Job Order Contracting (JOC) Implementation Services, which includes program development and support, procurement support, staff and contractor training, and technical support, and to develop and administer multiple customized construction JOC Contracts. This contract shall be a performance-based contract as no fees are paid up-front to the service provider, but a percentage fee is paid for successful issuance of construction task orders resulting from the service provider's preparation of unit price books and contract bid documents (see Section III: Scope of Services).

The City anticipates awarding to the selected Proposer an agreement with an initial term of three (3) years for an initial total amount not to exceed \$6 million (\$6,000,000) inclusive of all reimbursable costs and amount to be paid as a percentage fee for actual construction task orders issued. The agreement will have options to increase the initial term for up to two (2) additional years and increase the initial total amount for up to \$10 million (\$10,000,000). Award of contract neither guarantees all or a portion of the work described herein, nor does it guarantee that the entire amount of award would be expended. The contract dollar amount awarded DOES NOT represent a guaranteed revenue source for the successful Proposers. The City reserves the right to commence, terminate, reduce, or extend the Proposers' scope of services at any time in response to changing needs.

Digital files of the Request for Proposal (RFP) Package may be downloaded at no cost from the San Francisco Public Works Electronic Bid Documents download site at www.sfpublishworks.org/biddocs. Notices regarding Addenda and other proposal changes will be distributed by email to Plan Holders. It is the responsibility of Proposers to confirm receipt of any and all addenda issued for this RFP. Please visit Public Works' Contracts, Bid Opportunities and Payments webpage at: www.sfpublishworks.org for more information.

A Pre-Submission Meeting for proposers will be held on **Tuesday, August 29, 2017 at 10:30 a.m.**, at the Golden Gate Conference Room at 30 Van Ness Avenue, Suite 3000, San Francisco, CA 94102. Prime proposers are strongly encouraged to attend the Pre-Submission Meeting to obtain information regarding this RFP and the Job Order Contracting program.

Proposals are due by **3:00 p.m., Thursday, September 7, 2017. No late submissions will be accepted; no postmarks will be accepted.** Submit proposals to Contract Administration Division, ATTN: Aaron Wu, 1155 Market Street, 4th Floor, San Francisco, CA 94103.

The Local Business Enterprise (LBE) subcontracting participation requirement for this contract has been waived. Proposers are required to comply with all San Francisco Contract Monitoring Division (CMD) requirements. Proposers shall submit, along with their responses, all information required by CMD. The City encourages Joint Venture partners to submit proposals. CMD will participate in the Pre-Submission Meeting to answer questions regarding CMD requirements.

Written questions regarding the RFP shall be directed to Aaron Wu via e-mail at Aaron.Wu@sfdpw.org with subject line “Question Regarding RFP No. 1000006940 – (PW JOC Impl Svc)”. The deadline for receipt of clarification requests is five (5) business days before the submission due date.

Digital files of the RFP Package may be downloaded at no cost at: www.sfpublishworks.org/biddocs. Notices regarding Addenda and other proposal changes will be distributed by email to Plan Holders. It is the responsibility of Proposers to confirm receipt of any and all addenda issued for this RFP. Please visit Public Works’ Contracts, Bid Opportunities and Payments webpage at: www.sfpublishworks.org for more information.

The selection process will be based on evaluations of written submittals and proposed fee. The Proposer with the highest total score will be identified as the highest-ranked Proposer eligible to proceed with negotiations for the award of a Contract.

In accordance with San Francisco Administrative Code Chapter 6, no proposal is accepted and no contract in excess of \$600,000 is awarded by the City and County of San Francisco until such time as (a) the Mayor or the Mayor's designee approves the contract for award and (b) the Director of Public Works then issues an order of award. Pursuant to Charter Section 3.105, all contract awards are subject to certification by the Controller as to the availability of funds.

Consultants with billing classifications subject to prevailing wages on public works projects may not be awarded a contract unless such Consultants are registered with the Department of Industrial Relations (DIR) at the time of award. Please visit the DIR website for more information: <http://www.dir.ca.gov/Public-Works/PublicWorks.html>. ;

This Contract is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into any Contract with a Consultant that has its United States headquarters in a state with laws that perpetuate discrimination against LGBT populations (“Covered State”) or where any or all of the work on the contract will be performed in any of those states. A list of states on the Covered State List can be found at: <https://oag.ca.gov/ab1887>.

Schedule

The City has established the following anticipated schedule for the issuance, receipt and evaluation of Proposal, and award of an Agreement in response to this RFP. The following dates are non-binding, and are subject to change without prior notice:

ACTIVITY

DATE

Advertise RFP	August 22, 2017
Pre-Submission Conference	August 29, 2017, 1:30 PM
Deadline for Proposers to Submit Questions	August 31, 2017, 3:00 PM
Deadline for Proposers to Submit Proposal	September 7, 3:00 PM
Posting of Proposer Ranking	September 14, 2017
Notice of Award of Agreement	September 2017
Master Agreement Initiated	October 2017

II. BACKGROUND

A. City and County of San Francisco

The City and County of San Francisco (City) has multiple departments with contracting authority for construction work, including San Francisco Public Works (Public Works), San Francisco Public Utilities Commission (SFPUC), San Francisco Municipal Transportation Agency (SFMTA), San Francisco International Airport (SFIA), San Francisco Recreation and Park (SFRPD), and Port of San Francisco (SFPort). With the exception of SFPort, each listed agency utilizes or has utilized a JOC program as an option to contract with construction contractors for public work. Each program has required the services of a JOC consultant service provider to perform some or all of the services described within this RFP.

This RFP sets forth the qualifications needed, describes the submission requirements, establishes the criteria for selection, defines the selection process, and provides a Sample Agreement used by the City. The signed agreement resulting from this RFP will be between the service provider and Public Works, but the service provider will be working with each City department that requires services. All services, fees, and contractual obligations shall apply equally between the service provider and each City department, and each City department will be responsible for paying the service provider directly for fees incurred due to services received.

B. Job Order Contracting (JOC) Program

JOC contracts are competitively bid, indefinite quantity contracts – in which contractors bid an adjustment factor to preset construction unit prices – used to accomplish work needed for small size, multi-trades, minor construction, repair and remodel projects. A JOC contract comprises of a series of individual tasks issued as Contract Service Orders (CSOs) under the Master Agreement. JOC contracts were introduced in 2000 to Public Works as a cost effective and faster response alternative to the traditional design-bid-award contracts for its smaller public works projects for which City staff could not perform work. Public Works and other City agencies who have implemented JOC contracts managed by a JOC Construction Service provider have agreed that this method has proven to be effective in executing these smaller construction jobs.

Each City department's JOC program continues to implement and manage the scope of the JOC program in meeting the needs of clients throughout the City. To date, the past, current, and anticipated JOC contracts include, but are not limited to:

- A-licensed General Engineering Services contracts;
- B-licensed General Building Services contracts;
- C10 Electrical Services contracts;
- C20 Heating, Ventilating, and Air Conditioning Services contracts;
- C27 Landscaping Services contracts
- Other contracts as determined by each City department

III. SCOPE OF SERVICES

The successful Proposer for Job Order Contracting Implementation Services will be expected to provide:

Job Order Contracting Implementation Services

The primary role of the service provider will be to assist each City agency, under this agreement with Job Order Contract (JOC) Implementation Services, including program development, procurement support, staff and contractor training, and technical support. The service provider will be called upon to develop and administer multiple customized construction JOCs during the term of the Agreement.

Service provider shall provide qualified individuals to assist in the execution of contracts and task orders for the following types of Job Order Construction Contracts:

- Multiple A-license General Engineering Services contracts for San Francisco, San Mateo, Alameda, San Joaquin, Stanislaus, and Tuolumne counties.
- Multiple B-license General Building Services contracts for San Francisco, San Mateo, Alameda, San Joaquin, Stanislaus, and Tuolumne counties.
- Multiple specialty-licensed contracts for San Francisco, San Mateo, Alameda, San Joaquin, Stanislaus, and Tuolumne counties.

These following tasks provide general guidance to the service provider as to the anticipated scope of work, which the City reserves the right to modify or delete. At a minimum, the following Core Services shall be included in the Proposer's Proposed Fee and shall be available for each City department's JOC program, contracts, and task orders. The following Additional Services, if not proposed by the Proposer to be included within its Proposed Fee for Core Services, shall be available on an as-needed basis when requested on a per-Task Order basis.

Core Services:

- Transition Plan – If necessary, service provider will be responsible for the development and implementation of a transition plan, with City's approval, to transition from the current JOC System to the service provider's program. There will be no additional compensation for development and implementation of a transition plan.

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- Program Development, Implementation and Support – Service provider will be responsible for the development, implementation and on-going support of a City-customized JOC program.
 - Marketing – Service provider shall be responsible for marketing the JOC program by informing internal City staff about JOC, conducting pre-bid seminars for the JOC construction contractors, and assisting with procurement of the JOC contracts.
 - Contract Documents – Service provider will be responsible for preparing the JOC documents that will be used by the City to procure the JOC construction contractors including:
 - Unit Price Book – Service provider must provide a Unit Price Book containing no less than 150,000 individual construction tasks along with an associated unit price. Each unit price must be based on the prevailing equipment, material and labor prices within the San Francisco geographical region. The use of generic factors to localize prices is not acceptable. A price for demolition shall be provided for each construction task, if applicable.
 - Technical Specifications – Service provider must prepare a set of Technical Specifications that corresponds with the tasks in the Unit Price Book. Where available, City standard specifications will be incorporated into the Technical Specifications.
 - Contractual Terms and Conditions and Bid Forms – Service provider must prepare, in conjunction with City staff, Contractual Terms and Conditions and Bid Forms which incorporate JOC contract language and forms with all appropriate City contract language and forms.
 - Information Management System – Service provider will be responsible for providing the City with a comprehensive internet-based JOC information management system for an unlimited number of City and JOC contractor users. The JOC information management system must be used currently by a minimum of three (3) similar clients and must be capable of providing full project tracking, developing cost proposals, preparing independent estimates, generating all project documentation, providing project scheduling, budgeting and cost control, tracking LBE participation, and generating customized reports. Service provider must incorporate current City-wide forms and documentation into the information management system.
 - Procurement Support – Service provider will be responsible for providing the City with procurement support to market the JOC program to potential JOC contractors. The Service Provider will be required to organize and conduct pre-bid meetings with the intending bidders as well as make presentations on behalf of the City with various business and contracting organizations. Service provider staff assigned to perform procurement support must have extensive JOC procurement experience.

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- Training Program – Service provider will be responsible for developing and conducting a training program for City and JOC contractor staff to ensure that the JOC program functions properly. The training program must include specialized training courses that will involve all parties utilizing and administrating the JOC program. The training program must include extensive training on the use of the JOC Information Management System. All training must be "hands on" with functional use and individual performance as the objective. Actual City projects must be included in the training program.
 - On-going Technical Support – Service provider will be responsible for providing extensive on-going technical support to the City. Expectations include assistance with program execution, analysis of task order proposals, troubleshooting and continuous system monitoring. On-going technical support includes providing updated contract documents, assisting with the procurement of additional JOC contractors, providing access to all updates and revisions to the Information Management System, and providing training for new JOC contractors during the term of the contract. Providing on-going technical support is considered a vital component to ensuring a successful JOC program.
 - Proposal Development and Review Services – Service provider shall assist the City by training JOC contractors to use the Unit Price Book or equivalent tool to build price proposals for submission to JOC staff. Service provider shall also review submitted JOC contractor price proposals for accuracy and selection of appropriate construction tasks. After review, the service provider shall submit suggested revisions and coordinate with both City staff and the JOC contractor to create an agreeable proposal. The service provider may also be asked to review contractor's proposed construction schedule, list of proposed local subcontractors, and other relevant documents. Proposal Development and Review Services also include, but is not limited to:
 - Review and become familiar with the Detailed Scope of Work to obtain a clear understanding of the work to be performed.
 - Determine that the JOC contractor is proposing the reasonable means and methods to perform the work specified in the Detailed Scope of Work.
 - Verify that the correct tasks have been selected to perform the Detailed Scope of Work.
 - Verify quantities included in the Price Proposal against the Detailed Scope of Work or any design documents provided by the City.
 - Verify that any task listed that is not available in the Unit Price Book includes the requisite price justifications.
 - Verify that the correct adjustment factor and unit prices have been used to prepare the Price Proposal.
 - Explain the necessary revisions to the Price Proposal to the JOC contractor and assist the City in obtaining a final, auditable Price Proposal from the JOC contractor.
 - Real Time Pricing – Service provider shall utilize its own resources to estimate a unit cost for line items not in the Unit Price Book but is needed to be added for a contract in order to allow for completion of a task order cost proposal. The cost shall have supportive evidence for its pricing and must be agreeable by both the City and the

contractor. The line items and unit costs generated from this service shall be easily incorporated into existing JOC contracts and Information Management System. This service may be utilized in substitution of the contractor listing a non-pre-priced line item in their cost proposal.

- Reports – Service provider shall provide written reports as requested by the various San Francisco public agencies under this agreement. Format for the content of such reports shall be determined by each agency. The timely submission of all reports is a necessary and material term and condition of this Agreement. The reports, including any copies, shall be submitted electronically or on recycled paper and printed on double-sided pages to the maximum extent possible.
- Department Liaison – In performing the services provided for in this Agreement, the service provider shall work with each agency's JOC Program Manager and project teams for the respective needs of each department.

Additional Services:

- Job Order Development – Service provider shall assist the City with developing Job Orders from project identification to issuance. Service provider must provide lead team members who will work closely with City staff to analyze costs and ensure that the City is paying for the correct tasks and proper quantity by reviewing contractor proposals and providing necessary feedback. Qualified project managers will be made available to develop Job Orders as specified by each agency's JOC Program Manager. Job Order Development tasks also include, but is not limited to:
 - Project Identification – When a project is identified, service provider's representative shall contact the City and assist with determining whether the project is appropriate for JOC.
 - Contractor Identification – In the event the City has multiple JOC contractors, service provider shall assist the City in identifying the appropriate JOC contractor for the project based on the type of work involved and the location of the project.
 - Joint Scope Meeting – Service provider shall quickly schedule a Joint Scope Meeting at the project site to help the City and the JOC contractor agree on the details of the work that the JOC contractor will perform. The scoping process allows the JOC contractor to inspect the site and ask questions before submitting a Price Proposal. This upfront open communication eliminates the misunderstandings and mistakes that lead to most change orders and often results in more cost-effective collaborative solutions.
 - Develop Detailed Scope of Work – The service provider shall assist in preparing a Detailed Scope of Work that describes the work the JOC contractor will perform. Service provider shall also assist with resolving issues when project plans and actual conditions vary.
 - Request for Price Proposal – After all parties are in agreement that the Detailed Scope of Work properly reflects the work to be performed, the service provider shall send the Detailed Scope of Work and a Request for Proposal to the JOC contractor.

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- Prepare the Price Proposal – The JOC contractor will prepare and submit a Price Proposal by selecting the appropriate tasks from the Unit Price Book. The service provider's JOC software shall automatically calculate the total cost for each line item by multiplying the unit price of the task by the required quantities and the JOC contractor's competitively bid Adjustment Factor. The JOC contractor will also prepare additional City required information (e.g., construction schedule, list of proposed local subcontractors, etc.).
 - Price Proposal Review – The service provider shall review the Price Proposal to make sure the JOC contractor has selected the appropriate tasks and quantities and shall ask the JOC contractor to make any required changes. Service provider shall also obtain and review any City required information submitted by the JOC contractor such as a construction schedule and list of proposed subcontractors. The service provider shall submit the Price Proposal and related documents to the City.
 - Issue Job Order – Once the City is 100% satisfied with the Price Proposal and related documents, and decides to move forward with the project, the City will issue a purchase order to the contractor.
- Construction Estimating Services – Provide professional construction estimating services to the City on an as-needed basis, on JOC and non-JOC projects, consisting of building rough order of magnitude estimates, using national construction cost data, from stated scopes and/or construction drawings.
 - Construction Management Services – Service provider shall provide qualified team members to assist the City with construction management tasks on an as-needed basis as specified by each City agency's JOC program manager. Service provider's construction management staff may be asked to attend pre-construction meetings with City representatives and JOC contractors, perform site visits and create reports, assist in processing supplemental task orders, and collect required close-out documentation from contractors. Construction Management Services may also include, but not limited to:
 - Preconstruction – Service provider's construction manager shall conduct a pre-construction meeting with the City representative(s), the JOC contractor and, if applicable, the architect or engineer. The construction manager shall coordinate and share any preconstruction information with the City, the JOC contractor and other appropriate parties, and shall assist in the coordination of the JOC contractor obtaining the necessary permits.
 - Site Monitoring, Project Reporting, and Coordination – During construction, the service provider's construction manager shall monitor the JOC contractor's work in-progress, manage the JOC contractor's compliance with the approved safety plan and complete a report for each site visit. The service provider's construction manager shall provide daily, weekly, or other periodic construction status reports to the City as required for the project, conduct project progress meetings with all JOC contractors and staff on a periodic basis, and coordinate any required technical and code inspections.
 - Supplemental Job Orders – In the event that there are unforeseen conditions or the City requests changes to the scope after the work has begun, the service

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- provider's construction manager shall analyze and process a supplemental Job Order by utilizing the procedures used to develop the initial Job Order.
 - Payment and Performance Review – The service provider's construction manager shall review and approve, or direct necessary revisions to, the JOC contractor's applications for payment and obtain the City's approval of the work. Final acceptance of the work will be the responsibility of the City. Technical and code inspections will be the responsibility of the appropriate inspection agencies.
 - Project Close-Out – The service provider's construction manager shall enter all Job Order related information into the information management system and collect any required as-builts, warranties, and other close-out documents from the JOC contractor to deliver to the City for review, approval, and ownership.
- Project Budgeting and Planning Services – Service provider shall assist the City with project budgeting and planning services, developing all project costs including JOC pre-construction services, bidding services, and construction supervision as required.

Conditions:

The following conditions shall apply regardless of whether the services being provided are Core Services or Additional Services.

- **Relocation Costs:** The City will not pay relocation costs for service provider's team members assigned to the contract on a full-time or on-going basis. During the term of this Agreement, if team members with special skills are needed for specific tasks and those skills are not available from service provider in the San Francisco Bay Area, travel and temporary housing costs may be charged to the Agreement if those charges are pre-approved by the City. Any travel and temporary housing costs will be reimbursed at cost or the Federal Government's CONUS standards, whichever is lower.
- **Management of Data and Continuation of Task Orders Prior to This Agreement:** The City will not pay any additional costs for the service provider to transfer data of existing contracts and task orders to a proposed system that is different than what the City is currently utilizing, or if the service provider upgrades or modifies its system during the term of the agreement. If the service provider under this new agreement utilizes a different information management system, unit price book, technical specifications, and other tools to provide services, then these tools shall only apply to new task orders under this new agreement. All existing task orders prior to this agreement shall not be disrupted due to any changes in tools and services provided by the service provider, and the service provider shall provide all means to allow for the City and contractors to complete existing task orders at no additional cost to the City with no impact to construction schedule. The existing or former service provider for the JOC programs of each City department is The Gordian Group.
- **Stationing and Quantity of Service Provider Team Members:** Service provider shall have lead/key team members stationed locally in San Francisco at the location(s) desired by the City. The City will provide a designated work space (desk surface with electrical

outlets) for each team member of the service provider. At the time of this RFP, the City anticipates the need for a minimum of two (2) full-time team members from the service provider to provide services to a maximum of six (6) City department JOC programs.

The term Proposer shall refer to any legal entity(ies) submitting a statement in response to this Request for Proposal (RFP)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPWDept. Code: DPWType of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)Type of Service: Specialized Technical Support for a JOC system for Ch. 6 DeptsFunding Source: Various projects & general fundsPSC Amount: \$10,000,000PSC Est. Start Date: 07/03/2017PSC Est. End Date 11/30/2024**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

General services to assist the City in administering a Job Order Contracting (JOC) system as provided for in San Francisco Administrative Code Section 6.62 for use in expediting the design and construction of small and/or urgent projects. Service provider will prepare specialized Unit Price Books (construction cost catalog) with regional adjustments to costs for competitive bidding, technical specifications, provide proprietary JOC management software, and training to City staff and contractors in the use of a job order contracting system.

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

The proposed services are not currently performed by City staff but are necessary to implement and maintain JOC program functions, which improve the City's responsiveness for small construction projects. Denial will result in disruption to these services, which will, in effect, disrupt functionality of any department's JOC program to be covered under this PSC.

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 service was previously provided by PSC 4171-07/08, for the same services.

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.

Contract initial duration is anticipated for 5 years, however, PSC duration exceeds 5 years to account for time needed to advertise and award a contract.

2. Reason(s) for the Request**A. Indicate all that apply (be specific and attach any relevant supporting documents):**

☒ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

This is a specialized service requiring expertise, resources, research and development of the construction cost catalog (which includes over 100,000 construction tasks), management software, and database. All City departments utilizing this professional service intend to set up an enterprise agreement. This new agreement is expected to be completed by August 2017, which will allow for uninterrupted functioning of each City agency's JOC program.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Consultant must be able to prepare a Unit Price Book containing at least 100,000 unit prices covering material and labor costs for various units of construction; adjustment of those unit costs to current market conditions; prepare and publish technical specifications for Divisions 2-16 describing the materials, performance and installation requirements for each of the construction tasks listed in the Unit Price Book including annual updating as necessary; and, in conjunction with City staff, develop and publish the Contracts and Forms; provide software to manage contracts for construction; all in accordance with the needs and requirements of the various City departments.
- 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, however the consultant under PSC#4171-07/08 had provided the City with the Unit Price Book and JOC management software, both copyrighted. The service provider under this PSC will be expected to do the same.

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

None due to the extensive and proprietary nature of information and software provided by the current service provider.

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

- A. Explain why civil service classes are not applicable.
The consultant specializes in developing this alternative, specialized contracting system. None of the Civil Service Classifications has developed such a program. Specialized expertise and extensive research are needed to provide over 100,000 unit prices for construction projects. The program, while adjusted for use by City staff, is also provided to several agencies across the nation.
- 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, as this is a specialized service. One civil service class would not cover the breadth of services to be performed.

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 contract? If so, please explain what that will entail; if not, explain why not.
Yes. 20-25 employees, 8 hrs/employee; Civil Service classifications: 5120 Architectural Administrator, 5502/5504/5506 Project Managers, 5211 Senior Engineer/Architect, 5174 Administrative Engineer, 5241 Engineer, 5207 Associate Engineer, 5203 Assistant Engineer, 5201 Junior Engineer, 5268 Architect, 5366 Engineering Associate, 5265/5266 Architectural Associates, 1840/1842/1844 Management Assistants, 1820/1822/1824 Administrative Analysts. Training will be on how the JOC task order is developed and used; how to review JOC task order proposals using the JOC software and Unit Price Book; and how to prepare reports and contract documents using the JOC software.
- 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. **Union Notification:** On 03/28/2017, 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: David Bui Phone: 415-554-6417 Email: david.bui@sfdpw.org

Address: 1155 Market Street, 4th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43023 - 16/17

DHR Analysis/Recommendation:

action date: 05/01/2017

Commission Approval Required

Approved by Civil Service Commission

05/01/2017 DHR Approved for 05/01/2017

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR -- MYR

Dept. Code: MYR

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: As-needed professional document design and publishing

Funding Source: General Fund

PSC Duration: 4 years 30 weeks

PSC Amount: \$600,000

1. Description of Work

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

The contractor will assist the Mayor's Office of Public Policy and Finance staff in making decisions on a wide variety of layout, content, design, and production issues related to the annual Mayor's Proposed Budget Book. As required by the City Charter, the Mayor introduces the proposed budget by June 1, and the Proposed Budget Book is published on the same day. The budget book ranges from 300 to 400 pages, detailing the Mayor's budget priorities, investments, and serves as a transparent policy document for the public and policymakers.

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

The Mayor's Proposed Budget Book is a short-term project requiring diverse skills and expertise. It begins in the late winter, and must be completed by June 1 of each year, as per the City Charter. This creates a series of workload peaks, in April and May, which requires as-needed intermittent assistance. If this contract is denied, the Mayor's Office will have a hard time publishing the budget book by the June 1 deadline. The Mayor's Office of Public Policy and Finance staff does not have the design skills or tool to produce an attractive and well-organized budget book, and would publish a simple and less readable document that would not be helpful to the public and policymakers if made without the assistance of design professionals.

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.

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.

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Preparation of the Mayor's Budget Book is a short term project requiring specialized skills.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Key personnel should have recent experience with professional technical writing. This should include extensive professional experience with book design, printing and publishing techniques, and forms design. Applicants should have excellent editing skills in the English language including spelling, grammar, usage and punctuation. In addition, personnel should have extensive experience with professional publishing, printing and web-posting software, including but not limited to InDesign, Adobe PDF file creation, Microsoft Word, Excel,

Access and Postscript. Proposers should have the ability to convert and integrate component files (Word, Excel, Access, Adobe PDF) into print-ready files. Critically, personnel must be willing to work with the Mayor's Office of Public Policy and Finance on weekends, and during a very short timeframe, in particular, at the end of May to ensure the City meets the May 1 and June 1 deadlines to issue the proposed budget books.

B. Which, if any, civil service class(es) normally perform(s) this work? 5322, Graphic Artist;

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?

The office inquired with ReproMail as to whether the project could be conducted in-house. While ReproMail can perform a small part, they do not have the capacity to perform the needed work within a demanding schedule to produce the Mayor's Proposed Budget Book. This is a unique, short-term project requiring focused, specialized expertise not currently available from City staff as they are fulfilling existing responsibilities.

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 unique, short-term project requiring focused, specialized expertise not currently available from City staff as they are fulfilling existing responsibilities.

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 is a temporary need for specialized skills for a short duration each year. It is not practical to adopt a new civil service classification for this as-needed 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 contract? 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.

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. Union Notification: On 10/16/2020, 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: 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# 40415 - 20/21

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 02/01/2021

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhrrpscordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
To: [Lubamersky, Joan \(ADM\)](#); [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; xiumin.li@seiu1021.org; [Poon, Sin Yee \(HSA\)](#); david.canham@seiu1021.org; jtanner940@aol.com; [Lubamersky, Joan \(ADM\)](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40415 - 20/21
Date: Friday, October 16, 2020 3:11:58 PM

RECEIPT for Union Notification for PSC 40415 - 20/21 more than \$100k

The MAYOR -- MYR has submitted a request for a Personal Services Contract (PSC)

40415 - 20/21 for \$600,000 for Initial Request services for the period 01/31/2021 – 08/31/2025. 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:

<http://apps.sfgov.org/dhrdrupal/node/15626> 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: MAYOR Dept. Code: MYRType of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 42703 - 15/16)Type of Approval: ☐ Expedited ☐ Regular (☐ Omit Posting)Type of Service: As-needed professional technical writing and publishingFunding Source: General FundPSC Original Approved Amount: \$600,000PSC Original Approved Duration: 02/01/16 - 08/31/20 (4 years 30 wPSC Mod#1 Amount: \$69,200PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: _____

PSC Mod#2 Duration: _____

PSC Cumulative Amount Proposed: \$669,200PSC Cumulative Duration Proposed: 4 years 30 weeks**1. Description of Work****A. Scope of Work:**

The contractor will assist the Mayor's Office of Public Policy and Finance staff in making decisions on a wide variety of layout, content, design, and production issues related to the annual Mayor's Proposed Budget Book.

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

The Mayor's Proposed Budget Book is a short-term project requiring diverse skills and expertise. It begins in the late winter, and must be completed by June 1 of each year, as per the City Charter. This creates a series of workload peaks, in April and May, which require as-needed intermittent assistance. If this contract is denied, the Mayor's Office will have a hard time publishing the budget book by the June 1st deadline.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
yes

D. Will the contract(s) be renewed? Contractor selection will occur in the next few months through an open, c

2. Union Notification: On 04/02/20, the Department notified the following employee organizations of this PSC/RFP request: SEIU Local 1021; Architect & Engineers, Local 21;

FOR DEPARTMENT OF HUMAN RESOURCES USEPSC# 42703 - 15/16

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 04/14/2020

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Key personnel should have recent experience with professional technical writing. This should include extensive professional experience with book design, printing and publishing techniques, and forms design. Applicants should have excellent editing skills in the English language including spelling, grammar, usage and punctuation. In addition, personnel should have extensive experience with professional publishing, printing and web-posting software.

B. Which, if any, civil service class(es) normally perform(s) this work?
5320, 5322,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

This is a unique, short-term project requiring focused, specialized expertise not currently available from City staff as they are fulfilling existing responsibilities.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.

No, this is a temporary need for specialized skills for a short duration each year. It is not practical to adopt a new civil service classification for this as-needed work.

5. Additional Information (if "yes", attach explanation)

YES NO

- | | | |
|--|-------------------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
This PSC contains no training responsibilities. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? Yes, charter requirement | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? Timeliness of book requires vendor | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? Yes, Tandem will continue to provide the work | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

☒ THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 04/02/20 BY:

Name: Daniella Mattias Phone: 415-554-6486 Email: theodore.conrad@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 288 San Francisco, CA, 94102

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Remote Ergonomic Assessments (CS-1225)

Funding Source: General Manager's Office Operating Budget
PSC Amount: \$400,000

PSC Duration: 2 years 21 weeks

1. Description of Work

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

This work will include remote ergonomic assessments for individuals who are telecommuting and request an ergonomic evaluation. This work will include remote ergonomic assessments for individuals who are telecommuting and request an ergonomic evaluation. The assessments will include preparatory work with the individual, a videoconference where the ergonomic works one-on-one with the individual to adjust their workstation and determine if any additional solutions are needed (e.g. equipment from a list of approved ergonomic items SFPUC will provide), and then a written report afterwards on the findings and recommendations. Assessments will include preparatory work with the individual, a videoconference where the ergonomic works one-on-one with the individual to adjust their workstation and determine if any additional solutions are needed (e.g. equipment from a list of approved ergonomic items SFPUC will provide), and then a written report afterwards on the findings and recommendations.

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

With the move to full-time remote work, many staff are finding themselves unprepared for extended work at their home workstations, which may range from an actual desk, to their dining room table, to a couch or a bed. This could lead to the development of various cumulative trauma injuries due to employees not being able to adjust their new workstation to be ergonomically sound. The SFPUC has a few Health and Safety Program members who are trained and experienced in providing ergonomic assessments, however, we cannot accommodate the anticipated agency-wide demand at this time due to staff responding to the COVID-19 pandemic in addition to their normal duties. We anticipate up to 1,500 individuals requesting remote assessments and do not believe we can support this number of assessments. If this service is not approved, it could potentially lead to an extreme delay in internal assessments as each assessment takes at least an hour of time in addition to finding an appropriate opening in both individuals' schedules. This will lead to more employees developing cumulative trauma injuries, a greater severity in injury, and likely greater time spent on modified duty or lost time for the workers compensation claims that will result from these injuries.

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, it was previously provided internally, however, since the requests were all on location and were spread out over time our Health and Safety Program was able to handle the volume. This the first time a PSC has been requested for this service.

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.
not applicable

2. Reason(s) for the Request

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

☒ Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.

☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Immediately needed service for unanticipated situation: Before the pandemic began, employees could choose to telecommute and would need to verify that their home workstations were set up for their ergonomic needs. With the pandemic forcing all office workers to commute fulltime, many individuals who were unprepared to work from home are now telecommuting. This means that there is an immediate need to get a potentially large number of individual home workstations ergonomically adjusted for their users. As-needed service: This service would be provided on an as-needed basis as individuals request assistance setting up their remote workstations.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contract workers performing this will need to be trained ergonomists and familiar with assessing work locations over a video platform such as Bluejeans or Zoom. They will need to be good communicators and able to assess how to best make individual's existing workstations fit their ergonomic needs.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5177, Safety Officer; 6130, Safety Analyst; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Potentially a different video platform.

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

The City developed a list of approved ergonomic vendors for remote ergonomic assessments. We will be requesting a contract off of this list.

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

- A. Explain why civil service classes are not applicable.
The current SFPUC health and safety program is understaffed and is handling both COVID-19 support for the Department Operations Center (DOC) and field as well as their normal duties. There are only a few individuals within the program who are trained on how to perform ergonomic assessments and they are all currently stretched thin due to the pandemic.
- 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 only can this work already be performed by multiple classes (6130, 6138, 5177), it is sporadic and doesn't typically require much time. We are requesting the contract because we do not believe the current SFPUC health and safety program staff would be able to handle the volume of remote ergo workstation requests on top of their normal duties and COVID-19 support.

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 contract? 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. Union Notification: On 12/07/2020, 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: 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# 49703 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of wirwin@sfwater.org
To: [Irwin, William](#); [Laxamana, Junko \(BOS\)](#); 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; [Irwin, William](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 49703 - 20/21
Date: Monday, December 7, 2020 3:35:36 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 49703 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 49703 - 20/21 for \$400,000 for Initial Request services for the period 02/01/2021 – 06/30/2023. 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/15786> 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: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Power Utility Rate Consultant (PRO.0154)

Funding Source: Power Enterprise Operating Budget

PSC Duration: 2 years

PSC Amount: \$400,000

1. Description of Work

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

An independent analysis and review of revenue, costs of service, and rates for the electric utilities under the jurisdiction of the San Francisco Public Utilities Commission (SFPUC). Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service based on their respective service requirements, and development of schedules of electric rates to recover allocated costs from each retail customer class.

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

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years. The last review was completed in 2016. It is necessary that a contract will be issued to an independent consultant to comply with the requirement of the City Charter Section 8B.125. If a contract will not be approved, SFPUC will not be in compliance with the City Charter.

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.

Two power rate studies have previously been performed. They are: 2010 - PSC No. 4024 - 10/11 (CS-159) 2015 - PSC No. 45542 - 14/15 (PUC.PRO.0006)

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.

N/A

2. Reason(s) for the Request

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

☒ Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years. The last review was completed in 2016. It is necessary that a contract will be issued to an independent consultant to comply with the requirement of the City Charter Section 8B.125.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Knowledge of electric utility design and operation, knowledge to assign annual revenues to categories of costs based on utility function, knowledge to develop units of service based on energy use and demand by service level, and knowledge of rates structures and design principles. Ability to communicate methodology and results to Commission, Rate Fairness Board, and SFPUC management and other stakeholders.

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. If applicable, what efforts has the department made to obtain these services through available resources within the City?

None. The City Charter Section 8B.125 requires that in setting retail rates, fees and charges, the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.

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

A. Explain why civil service classes are not applicable.

None. The City Charter Section 8B.125 requires that in setting retail rates, fees and charges the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.

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 Charter Section 8B.125 is very specific about hiring an independent consultant, so the work cannot be performed by any City 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 contract? If so, please explain what that will entail; if not, explain why not.
No. Staff will take the opportunity to learn from the consultant's work to inform other utility rate work that is performed during the "off years" between the Charter-required rate studies by independent consultants.

C. Are there legal mandates requiring the use of contractual services?
Yes. Yes. San Francisco Charter Section 8B.125.

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. Union Notification: On 12/30/2020, 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: Daniel Kwon Phone: 415-934-5722 Email: dkwon@sfgwater.org

Address: 525 Golden Gate Ave, 8th Floor San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44319 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of dkwon@sfgwater.org
To: [Kwon, Daniel](#); [Emanuel, Rachel \(DEM\)](#); laborers261@gmail.com; [Laxamana, Junko \(BOS\)](#); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tony@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@SFMEA.com; [Meyers, Julie \(HSA\)](mailto: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@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.com; 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; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@SFMEA.com; ecdenvoter@aol.com; thomas.vitale@seiu1021.org; [Kwon, Daniel](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PCS # 44319 - 20/21
Date: Wednesday, December 30, 2020 10:16:35 PM

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RECEIPT for Union Notification for PSC 44319 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 44319 - 20/21 for \$400,000 for Initial Request services for the period 01/15/2020 – 01/14/2022. 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/15903> 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)

SEC. 8B.125. RATES.

Notwithstanding Charter sections 2.109, 3.100 and 4.102 or any ordinance (including, without limitation, Administrative Code Appendix 39), the Public Utilities Commission shall set rates, fees and other charges in connection with providing the utility services under its jurisdiction, subject to rejection - within 30 days of submission - by resolution of the Board of Supervisors. If the Board of Supervisors fails to act within 30 days the rates shall become effective without further action.

In setting retail rates, fees and charges the Commission shall:

1. Establish rates, fees and charges at levels sufficient to improve or maintain financial condition and bond ratings at or above levels equivalent to highly rated utilities of each enterprise under its jurisdiction, meet requirements and covenants under all bond resolutions and indentures, (including, without limitation, increases necessary to pay for the retail water customers' share of the debt service on bonds and operating expenses of any state financing authority such as the Regional Water System Financing Authority), and provide sufficient resources for the continued financial health (including appropriate reserves), operation, maintenance and repair of each enterprise, consistent with good utility practice;
2. Retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years;
3. Set retail rates, fees and charges based on the cost of service;
4. Conduct all studies mandated by applicable state and federal law to consider implementing connection fees for water and clean water facilities servicing new development;
5. Conduct studies of rate-based conservation incentives and/or lifeline rates and similar rate structures to provide assistance to low income users, and take the results of such studies into account when establishing rates, fees and charges, in accordance with applicable state and federal laws;
6. Adopt annually a rolling 5-year forecast of rates, fees and other charges; and
7. Establish a Rate Fairness Board consisting of seven members: the City Administrator or his or her designee; the Controller or his or her designee; the Director of the Mayor's Office of Public Finance or his or her designee; two residential City retail customers, consisting of one appointed by the Mayor and one by the Board of Supervisors; and two City retail business customers, consisting of a large business customer appointed by the Mayor and a small business customer appointed by the Board of Supervisors.

The Rate Fairness Board may:

- i. Review the five-year rate forecast;
- ii. Hold one or more public hearings on annual rate recommendations before the Public Utilities Commission adopts rates;
- iii. Provide a report and recommendations to the Public Utilities Commission on the rate proposal; and
- iv. In connection with periodic rate studies, submit to the Public Utilities Commission rate policy recommendations for the Commission's consideration, including recommendations to reallocate costs among various retail utility customer classifications, subject to any outstanding bond requirements.

These provisions shall be effective January 3, 2003 for the setting of retail rates, fees and charges related to the clean water system. If the voters approve bonds for the Public Utilities Commission's Capital Improvement Program at the November 5, 2002 election then the provisions of this section shall take effect on July 2, 2006 for the setting of retail rates, fees and charges related to the water system. If the voters do not approve such bonds then this section will take effect on January 3, 2003.

(Added November 2002)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUCDept. Code: PUCType of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)Type of Service: Power Utility Rate Consultant (PRO.0154)Funding Source: Power Enterprise Operating BudgetPSC Duration: 2 years 4 weeksPSC Amount: \$400,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

An independent analysis and review of revenue, costs of service, and rates for the electric utilities under the jurisdiction of the San Francisco Public Utilities Commission (SFPUC). Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service based on their respective service requirements, and development of schedules of electric rates to recover allocated costs from each retail customer class.

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

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years. The last review was completed in 2016. It is necessary that a contract will be issued to an independent consultant to comply with the requirement of the City Charter Section 8B.125. If a contract will not be approved, SFPUC will not be in compliance with the City Charter.

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.

Two power rate studies have previously been performed. They are: 2010 - PSC No. 4024 - 10/11 (CS-159) 2015 - PSC No. 45542 - 14/15 (PUC.PRO.0006)

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.

N/A

2. Reason(s) for the Request**A. Indicate all that apply (be specific and attach any relevant supporting documents):**

☒ Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years. The last review was completed in 2016. It is necessary that a contract will be issued to an independent consultant to comply with the requirement of the City Charter Section 8B.125.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Knowledge of electric utility design and operation, knowledge to assign annual revenues to categories of costs based on utility function, knowledge to develop units of service based on energy use and demand by service level, and knowledge of rates structures and design principles. Ability to communicate methodology and results to Commission, Rate Fairness Board, and SFPUC management and other stakeholders.

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. If applicable, what efforts has the department made to obtain these services through available resources within the City?

None. The City Charter Section 8B.125 requires that in setting retail rates, fees and charges, the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.

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

A. Explain why civil service classes are not applicable.

None. The City Charter Section 8B.125 requires that in setting retail rates, fees and charges the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.

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 Charter Section 8B.125 is very specific about hiring an independent consultant, so the work cannot be performed by any City 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 contract? If so, please explain what that will entail; if not, explain why not.
No. Staff will take the opportunity to learn from the consultant's work to inform other utility rate work that is performed during the "off years" between the Charter-required rate studies by independent consultants.

C. Are there legal mandates requiring the use of contractual services?
Yes. Yes. San Francisco Charter Section 8B.125.

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. Union Notification: On 09/30/2019, 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: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfgwater.org

Address: 525 Golden Gate Ave, 8th Floor San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47493 - 19/20

DHR Analysis/Recommendation:

action date: 11/04/2019

Commission Approval Required

Approved by Civil Service Commission

11/04/2019 DHR Approved for 11/04/2019



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR

E. DENNIS NORMANDY
PRESIDENT

DONALD A. CASPER
VICE PRESIDENT

MORGAN R. GORRONO
COMMISSIONER

LISA SEITZ GRUWELL
COMMISSIONER

MARY Y. JUNG
COMMISSIONER

ANITA SANCHEZ
EXECUTIVE OFFICER

MINUTES Regular Meeting August 16, 2010

2:00 p.m.
ROOM 400, CITY HALL
1 Dr. Carlton B. Goodlett Place

CALL TO ORDER

2:05 p.m.

ROLL CALL

President E. Dennis Normandy	Present
Vice President Donald A. Casper	Present
Commissioner Morgan R. Gorrondo	Not Present (Notified absence)
Commissioner Lisa Seitz Gruwell	Present
Commissioner Mary Y. Jung	Present

President E. Dennis Normandy presided.

President Normandy welcomed Lisa Seitz Gruwell as the newest Commissioner to the Civil Service Commission.

APPROVAL OF MINUTES

Regular Meeting of August 2, 2010

Action: Approve. (Vote of 4 to 0)

ANNOUNCEMENTS

The Executive Officer announced that due to the Labor Day Holiday, there will only be one meeting in September which will be held on September 20, 2010.

**0282-10-8 Review of request for approval of proposed personal services contracts.
(Item No. 4)**

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4023-10/11	Human Resources	\$150,000	Consultant will work with Airport and Department of Human Resources ("DHR") staff to improve and expand upon the functionality of DHR's internal Classification database, and develop a consistent methodology for improving classification decisions. Consultant will work with City staff to redesign and develop a database tool to categorize knowledge, skills, abilities, and corresponding activities and tasks consistent with the principles of industry accepted standards, such as O*NET. This new tool will ensure Citywide consistency within the classification plan and will facilitate appropriate classification selections based on multi-level search criteria that accurately reflect duties and responsibilities of the position. The goal of this service is to create a highly efficient, standardized, front-end, interactive database tool designed to minimize the potential for appointing officers to make classification decisions based solely on desired pay or other preconceived notions that result in inappropriate grade inflation (e.g., making an appointment to a manager classification when an advanced technical level classification would be more appropriate for the duties and the responsibilities of the position), and reduce inconsistencies and perceived subjectivity in classification decisions throughout the City.	Regular	12/31/11
4024-10/11	Public Utilities Commission	\$139,000	Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service base on their respective service requirements and development of schedules of electric rates to recover allocated costs from each retail customer class. Contract deliverables in addition to schedules of rates include the development of cost of service model to permit Hetch Hetchy (HH) staff to annually update the cost of service analysis.	Regular	12/31/12
4025-10/11	Public Utilities Commission	\$2,500,000	Provide municipal financing advisory services to the SFPUC in the structuring and competitive sale of taxable and tax-exempt revenue bonds, taxable and tax-exempt commercial paper, certificates of participation, Clean Renewable Energy Bonds (CREBs), Qualified Energy Conservation Bonds (QECBs), and other forms of municipal financing.	Regular	09/15/17

Speakers:

Steve Ponder and Ted Yamasaki, Department of Human Resources spoke on PSC #4023-10/11.
William Laws, Public Utilities Commission spoke on PSC #4024-10/11.

Action:

Adopt the report; Approve request for proposed personal services contracts. Notify the Office of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUCDept. Code: PUCType of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)Type of Service: Utility Rate Consulting (PRO 0006 14)Funding Source: SFPUC General FundPSC Duration: 1 year 30 weeksPSC Amount: \$200,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

An independent analysis and review of revenue, costs of service, and rates for the electric utilities under the jurisdiction of the San Francisco Public Utilities Commission (SFPUC). Contract work consists of development of annual revenue requirement for electric service, allocation of the annual revenue requirement to retail classes of service based on their respective service requirements and development of schedules of electric rates to recover allocated costs from each retail customer class.

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

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years. The last review was in 2010. It is necessary that a contract will be issued to an independent consultant to comply with the requirement of the City Charter Section 8B.125. If a contract will not be approved, SFPUC will not be in compliance with the City Charter.

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 service became necessary after the approval of the Charter Section 8B.125 in 2002. This service was provided in the past via PSC No. 4024-10/11 (CS-159) which has expired.

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.
not applicable**2. Reason(s) for the Request****A. Indicate all that apply (be specific and attach any relevant supporting documents):**

☒ Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

B. Explain the qualifying circumstances:

The San Francisco City Charter Section 8B.125 requires an independent review be done at least every five years.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Knowledge of electric utility design and operation, knowledge to assign annual revenues to categories of costs based on utility function, knowledge to develop units of service based on energy use and demand by service level, and knowledge of rates structures and design principles. Ability to communicate results to Commission, Rate Fairness Board, and SFPUC management and other stakeholders. Minimum of fifteen (15) years of experience providing rate consulting service to utilities similar in size and complexity as the SFPUC.

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. If applicable, what efforts has the department made to obtain these services through available resources within the City?

None. The City Charter Section 8B.125 requires that in setting retail rates, fees and charges the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.

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

- A. Explain why civil service classes are not applicable.
The City Charter Section 8B.125 requires that in setting retail rates, fees and charges the SFPUC shall retain an independent rate consultant to conduct rate and cost of service studies for each utility at least every five years. As such, the SFPUC cannot obtain these services through available City resources.
- 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 Charter Section 8B.125 is very specific about hiring an independent consultant, so the work cannot be performed by any City 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 contract? If so, please explain what that will entail; if not, explain why not.
No. See attachment
- C. Are there legal mandates requiring the use of contractual services?
Yes. San Francisco Charter Section 8B.125.
- 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. Union Notification:** On 11/10/2014, 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: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfgwater.org

Address: 525 Golden Gate Avenue, 8th Floor San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45542 - 14/15

DHR Analysis/Recommendation:

action date: 01/05/2015

Commission Approval Required

Approved by Civil Service Commission

01/05/2015 DHR Approved for 01/05/2015

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Waste diversion and education

Funding Source: General Fund

PSC Amount: \$320,000

PSC Est. Start Date: 04/01/2021

PSC Est. End Date 04/01/2025

1. Description of Work

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

Staff are needed to run zero waste sorting stations at Dolores park and provide education to park visitors on the weekends during the busy summer season. Park visitors interact with Eco-Pop Up staff by bringing their compost, recycling, and trash to the designated areas, where they are helped by Eco-Pop Up staff to sort their waste in the appropriate bins. Full compost & recycling totters are then emptied into large Recology debris boxes, to be serviced by Recology on a weekly basis. Waste diversion metrics are collected daily on the weekends to track usage and measure the season's overall waste diversion success.

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

Since the reopening of the park after its 2015 renovation, the Eco- Pop Ups & staff have helped RPD achieve its dual goals of diverting trash from landfill while keeping Dolores Park clean. This program has helped address some of the major littering issues by expanding the much needed waste capacity during the summer peak months, educating users on Leave No Trace principles, maintaining one of the cleanest three stream service in the public sphere in the city, and reducing litter left behind in on the grass in the park by 67% in the last 5 years alone. In addition, there has been a 73.24% DECREASE of staff hours spent picking up litter in the park, providing cost savings for the department but also allowing gardening staff to focus on beautifying our parks so everyone can come enjoy them. Without these services not only will Dolores Park's trash issue become the focus of news media, elected officials, and the general public once again, but it will also negatively impact everyday operations for the Park Service Area staff who would need to take up the task of cleaning the park. The cost associated with finding & adding additional staff, paying for overtime, and the hours required to clean the park using Recreation and Park Department (RPD) staff is greater than the cost for maintaining the current service program. Furthermore, the denial of the Eco-Pop Up's staffing service would reduce recycling and compost components at this site, resulting in the loss of credit reductions given by Recology in our bills that would further increase the operational maintenance cost for this site. Lastly, as RPD works to fight climate change by meeting the City's Zero Waste Goals, this program is crucial in the work we've committed to meet those goals.

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.

In the past, the Eco-Pop Up Project has hired temporary staff for the Summer season to run the different waste stations with the help of Recology. The last two years, we have used Race to Zero and before that we worked with the Conservation Corps, as a sub to Recology. These two organizations would submit a monthly bill to Recology for their service of staffing the Eco-Pop Up stations, Recology would pay them, and then Recology would pass the cost on to us. However, we can no longer do that and thus need to do a RFP for these services. We need to have a supplier in place no later than April 1, 2021.

D. Will the contract(s) be renewed?

Yes - renewed yearly for the summer season.

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.

- ☒ Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Staff are needed to run zero waste sorting stations at Dolores park and provide education to park visitors on the weekends during the busy summer season. Park visitors interact with Eco-Pop Up staff by bringing their compost, recycling, and trash to the designated areas, where they are helped by Eco-Pop Up staff to sort their waste in the appropriate bins. Full compost & recycling totters are then emptied into large Recology debris boxes, to be serviced by Recology on a weekly basis. Waste diversion metrics are collected daily on the weekends to track usage and measure the season's overall waste diversion success. Despite City and County of SF requirements that large waste generators sort waste into three streams (landfill, recyclable, and compost) and the Department of Environment's additional requirements, plus Recology's significant financial incentive to divert waste out of landfill, there is no city classification that requires sorting.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Zero Waste & Leave No Trace Knowledge Understand San Francisco's waste sorting materials & what Recology can recycle & compost. Ability to educate and talk to diverse groups of people in the park
- 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: Contractor will supply their own trash pickers, tents, and tools needed to run the zero waste stations. RPD will provide the totters through Recology, tables for sorting, and debris boxes through Recology for collection of compost & recycling materials.

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

We have tried to use 9910 PST program, but there is no appropriate classification for supervision.

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

- A. Explain why civil service classes are not applicable.
Despite City and County of SF requirements that large waste generators sort waste into three streams (landfill, recyclable, and compost) and the Department of Environment's additional requirements, plus Recology's significant financial incentive to divert waste out of landfill, there is no city classification that requires sorting. Although custodians, like all staff, must perform "other duties as assigned," custodians have no training, no requirement to learn, and sorting does often mean touching waste and they are except for that action.
- 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. Yes, although RPD is the largest waste generator in CCSF, and we are Recology's largest customer in the city, there are other city departments who also have high waste management volume and could benefit. Resource recovery is required by our Charter, but we do not have appropriate classification.

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 contract? If so, please explain what that will entail; if not, explain why not.
No. No training - Contractor will be responsible for waste diversion and education.
- 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. Union Notification: On 12/09/2020, 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: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41483 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)



Receipt of Notice for new PCS over \$100K PSC # 41483 - 20/21

McFadden, Sean (REC)

Wed 12/9/2020 5:12 PM

To: Webster, Bridget (REC)

-----Original Message-----

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of sean.mcfadden@sfgov.org

Sent: Wednesday, December 9, 2020 3:56 PM

To: McFadden, Sean (REC) <sean.mcfadden@sfgov.org>; Laxamana, Junko (BOS) <junko.laxamana@sfgov.org>; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tony@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@SFMEA.com; Meyers, Julie (HSA) <Julie.Meyers@sfgov.org>; seichenberger@local39.org; camaguey@sfmea.com (contact) <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, Katherine (PUC) <kbasconcillo@sfgov.org>; 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.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA) <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; bart@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; McFadden, Sean (REC) <sean.mcfadden@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Notice for new PCS over \$100K PSC # 41483 - 20/21

RECEIPT for Union Notification for PSC 41483 - 20/21 more than \$100k

The RECREATION AND PARK COMMISSION -- REC has submitted a request for a Personal Services Contract (PSC) 41483 - 20/21 for \$320,000 for Initial Request services for the period 04/01/2021 – 04/01/2025. 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:

<http://apps.sfgov.org/dhrdrupal/node/15794> 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: PUBLIC HEALTH -- DPH

Dept. Code: DPH

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Specialized Services Pharmaceutical Equipment

Funding Source: General Funds

PSC Duration: 9 years 1 day

PSC Amount: \$25,000,000

1. Description of Work

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

The Contractor(s) will provide services in support of an integrated system of Automated Dispensing Cabinets (ADC) for pharmaceuticals and related pharmacy technology, which includes optional automated pharmaceutical carousels and pharmaceutical packaging equipment. Services shall include equipment manufacture and delivery, design/build engineering and construction services for a complete installation, permits, system implementation, end user training, equipment maintenance, software licensing and maintenance, full integration with the Department of Public Health's (DPH's) electronic health record system and other clinical applications, consulting services, and other services required to keep the system and leased equipment in good repair and fully functional. The design/build portion of the total contract is estimated at \$3.2 million, of which 15% is design and 85% is build.

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

The service is necessary to operate a modern integrated health network. The services will support a highly complex and integrated pharmaceutical distribution system, which will support the accurate and secure provision of pharmaceuticals to an acute care hospital, long-term care facility, jail health system, and community clinic network. These operations are heavily regulated by the federal and State governments, and quality patient care is directly dependent upon the highest quality operations. These services are required to ensure equipment and software applications remain secure and in good repair and that pharmacy staff and clinicians have unfettered access to critical information and databases. The required equipment and software is proprietary to the Original Equipment Manufacturer (OEM). DPH staff is limited in its ability to provide these services and cannot fully meet the needs of DPH Pharmacy. In addition, since the core equipment will be leased and not owned by the Department, the Department will be obligated to maintain the equipment per manufacturer standards through the term of the equipment lease. Denial of this request will dramatically inhibit DPH Pharmacy's ability to operate and will endanger DPH ability to provide high quality patient care.

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 are provided under an existing lease and equipment maintenance contract.

D. Will the contract(s) be renewed?

Yes.

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 proposed PSC encompasses all services which are needed to execute an equipment lease and all related ancillary services for Automated Dispensing Cabinets (ADC) and related equipment for use in the pharmaceutical services unit across multiple operating units and facilities of the Department of Public Health. The length of time of the PSC is coterminous with the length of an operational lease agreement (including negotiated optional lease hold over terms) for the equipment. The term will allow the Department to align lease terms with anticipated technology life cycles and represents an anticipated lease payment schedule that will be fiscally responsible for the Department.

2. Reason(s) for the Request

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

☒ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

Proprietary knowledge of equipment and software to support an integrated, high availability pharmaceutical distribution system; knowledge of up to date pharmaceutical industry standards, best practices and future trends, including regulatory and licensure issues; access to proprietary software including security patches, updates and upgrades; access to proprietary replacement parts needed for equipment repair. For the Design / Build services, hospital design & construction experience permitted by the Office of Statewide Health Planning and Development, such as cabinet anchorage & emergency power, for installations in hospital buildings.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Proprietary knowledge of equipment and software to support an integrated, high-availability pharmaceutical distribution system; knowledge of up-to-date pharmaceutical industry standards, best practices and future trends, including regulatory and licensure issues; access to proprietary software, including security patches, updates and upgrades; access to proprietary replacement parts needed for equipment repair; for the design/build services, experience in hospital design and construction permitted by the Office of Statewide Health Planning and Development (OSHPD) (such as cabinet anchorage and emergency power) for installations in hospital buildings.

B. Which, if any, civil service class(es) normally perform(s) this work? 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1091, IT Operations Support Admin I; 1092, IT Operations Support Admin II; 1093, IT Operations Support Admin III; 1094, IT Operations Support Admin IV; 1095, IT Operations Support Admin V; 1824, Pr Administrative Analyst; 2409, Pharmacy Technician; 2450, Pharmacist; 2453, Supervising Pharmacist; 2454, Clinical Pharmacist; 5120, Architectural Administrator; 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 5260, Architectural Assistant 1; 5261, Architectural Assistant 2; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 0922, Manager I; 0923, Manager II; 0931, Manager III; 0932, Manager IV; 0933, Manager V;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide an integrated, high availability, system that will include Automated dispensing cabinets and optional automated pharmaceutical carousels and pharmaceutical packaging equipment. Through a multiyear operational lease. In addition, the contractor(s) may also provide secure hosting services for any of the core and ancillary information systems required for the operation of the integrated system.

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

Medical equipment services such as these are currently provided by DPH for non-proprietary systems. In this case, the new equipment and software are proprietary to the equipment manufacturer and DPH staff are unable to provide the specialized information support services. In addition, since the proprietary equipment will be leased and not owned by the Department, it must be maintained per the manufacturer's directions and with the manufacturer's replacement parts throughout the term of the lease. DPH biomedical engineering staff do not have access to these proprietary processes, software and parts. The design and engineering services associated with the design/build portion of the work are currently provided by the Department of Public Works (DPW). DPW is the designated entity for design and construction contracting for DPH, as required by Chapter 6 of the San Francisco Administrative Code. DPW has been petitioned and does not have the design and engineering resources available at this time to respond to the accelerated schedule of this request. DPW has submitted requests to fill vacancies and new positions to respond to the needs of DPH in the future.

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

A. Explain why civil service classes are not applicable.

For the design/build portion of the project—including installation services—the work will be short-term and needed only during the installation phase. Ongoing services must be provided by the manufacturer of the equipment and or software and must conform to the original equipment manufacturer standards. Civil service staff are not available to respond to the accelerated schedule of the design/build portion of the project. However, they will provide oversight, management and inspection 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. The services are proprietary to the OEM'S standards for its leased equipment. The Department will utilize DPH and DPW staff to perform services that do not require proprietary knowledge possessed only by the OEM of the leased equipment. Throughout the course of the system's lifespan, any available training by the OEM will be accessible to staff, as well as the opportunity for knowledge transferred from contractor(s) to staff so that day-to-day operations may can be performed by Department staff.

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 contract? If so, please explain what that will entail; if not, explain why not.
Yes. Yes. Training will be included when available to ensure staff is trained on system functions, operations, troubleshooting and maintenance that is not proprietary to the OEM. Primary recipients of system training will be pharmacy, nursing and IT support staff.
- 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. Union Notification: On 10/23/2020, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Municipal Executive Association; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous; SEIU Local 1021; 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

Address: 1380 Howard Street, Room 421b San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43068 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Hale, Jacquie (DPH)

From: dhr-psccordinator@sfgov.org on behalf of jacquie.hale@sfdph.org
Sent: Friday, October 23, 2020 4:36 PM
To: Hale, Jacquie (DPH); mleach@ibt856.org; sarah.wilson@seiu1021.org; thomas.vitale@seiu1021.org; Sandeep.lal@seiu1021.me; leah.berlanga@seiu1021.org; 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; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); david.canham@seiu1021.org; jtanner940@aol.com; amakayan@ifpte21.org; Laxamana, Junko (BOS); Criss@SFMEA.com; camaguey@sfmea.com (contact); 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; Longhitano, Robert (DPH); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 43068 - 20/21

RECEIPT for Union Notification for PSC 43068 - 20/21 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 43068 - 20/21 for \$25,000,000 for Initial Request services for the period 02/01/2021 – 01/31/2030. 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/15627> 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: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

Type of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Repair of specialized equipment by manufacturer

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$800,000

1. Description of Work

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

The Contractor(s) will provide as-needed and scheduled maintenance, warranty, and intermittent repair services on City-owned specialty vehicles and equipment. The Contractor(s) is the Manufacturer(s) exclusive and sole service distributor within its assigned territories including the City and County of San Francisco. The Contractor is to offer OEM parts and manufacturer-certified and -trained authorized technicians to provide required services for specialty brand machinery.

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

Fleet Management Division provides maintenance to specialty vehicles and equipment maintenance for over 30 City departments. Anticipated machinery brand manufacturers have proprietary rights to their brands' parts and services, which are only available from authorized dealers for specific regions. Denial of approval would necessitate the use of aftermarket parts and uncertified services that would void warranties and reduce the life spans and effectiveness of the assets.

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.

These services have been performed on an as-needed basis by manufacturer-authorized sole source suppliers through OCA-issued purchase orders that initiated with single-use quote-associated requisitions.

D. Will the contract(s) be renewed?

If needed, and if the contractor retains manufacturer authorization.

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.

☒ 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).

B. Explain the qualifying circumstances:

Work requires specialized tools and skills to work on this equipment. Some work is as-needed.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Contractor(s) carries specific manufacturers' authorization to perform repair services by experienced, manufacturer-trained/certified technicians with access to proprietary diagnostic tools/software and extensive knowledge of the brand's range of machines, and the Repair Industry rules and guidelines.

B. Which, if any, civil service class(es) normally perform(s) this work? 7306, Automotive Body & Fender Wrk; 7309, Car

and Auto Painter; 7315, Auto Machinist Asst Sprv; 7318, Electronic Maintenance Tech; 7410, Automotive Service Worker;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contracted work will be done at the Contractor(s)' facilities. The Contractor(s) will use permitted and specialized proprietary equipment that is necessary to complete the contracted work.

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

Other City departments do not have employees who have the manufacturers' authorization to perform repair services.

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

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

Standard repair and parts replacement work is performed in-house when the scope of work meets the available resources and staff's knowledge and skills. The contracted services are as-needed and intermittent, based on the diagnostic repair scope. Existing civil service classes are not required to have the brand-specific training and certification needed to perform such repairs, nor does the department have access to the necessary proprietary diagnostic tools/software. For such warranty services or complicated repairs, specialized experts using manufacturer-certified and -authorized proprietary diagnostic/inspection tools and equipment are required.

- 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 service would not be in the best interest of the City to attempt to provide. It would not be possible for City employees to perform warranty services, nor would it be practical for the City to acquire and maintain the multiple brand-specific proprietary tools/software needed to perform the types of repairs in question, which are only needed on an intermittent and 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 contract? 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.

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. Union Notification: On 10/13/2020, the Department notified the following employee organizations of this PSC/RFP request:

Automotive Machinists, Local 1414; Electrical Workers, Local 6; TWU - Automotive Service Worker

☒ 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# 44328 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

From: dhrrpscordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
To: [Lubamersky, Joan \(ADM\); oashworth@ibew6.org; khughes@ibew6.org; agonzalez@iam1414.org; speedy4864@aol.com](mailto:Lubamersky,Joan(ADM);oashworth@ibew6.org;khughes@ibew6.org;agonzalez@iam1414.org;speedy4864@aol.com); [Lubamersky, Joan \(ADM\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Lubamersky,Joan(ADM);DHR-PSCCoordinator,DHR(HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 44328 - 20/21
Date: Tuesday, October 13, 2020 2:20:23 PM

RECEIPT for Union Notification for PSC 44328 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 44328 - 20/21 for \$800,000 for Initial Request services for the period 01/04/2021 – 01/03/2026. 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/dhrrupal/node/15628> 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

From: [Lubamersky, Joan \(ADM\)](#)
To: [Roger Marengo](#)
Subject: PSC 44328 Vehicle Repair by Manufacturer Trained Technicians
Date: Tuesday, October 13, 2020 3:27:00 PM
Attachments: [image001.png](#)
[PSC 44328 20.21 as posted 10.13.20.pdf](#)

October 13, 2020

MEMORANDUM

TO: Roger Marengo, Local 250-A

FROM: Joan Lubamersky, Contract Coordinator
Office of the City Administrator

SUBJ: Proposed Personal Services Contract (PSC) 44328 20.21
Specialized vehicle repair by manufacturer trained technicians

This memorandum is being sent to you via email because TWU Local 250A does not receive notices of City of San Francisco PSCs via our automated system.

These services were previously provided via Purchase Order from the Office of Contract Administration. We have been advised to request a PSC this year. This contract is to provide as-needed and scheduled maintenance, warranty, and intermittent repair services on City-owned specialty vehicles and equipment. The Contractor(s) is the Manufacturer(s) exclusive and sole service distributor within its assigned territories including the City and County of San Francisco. The Contractor is to offer OEM parts and manufacturer-certified and -trained authorized technicians to provide required services for specialty brand machinery. Our request for approval is attached.

Please let me know if you have any questions, Joan.Lubamersky@sfgov.org

Your union has thirty days in which to ask questions about this PSC before it moves forward to the Department of Human Resources (DHR), DHR-PSCCoordinator@sfgov.org for approval. Please contact me and DHR if you have any questions. I have copied that email address on this email.

Attachments: PSC 44328 20.21

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362

Additional Attachment(s)



OFFICE OF THE
CITY ADMINISTRATOR



London N. Breed, Mayor
Naomi M. Kelly, City Administrator

January 8, 2021

MEMORANDUM

TO: Honorable Civil Service Commission

FROM: Joan Lubamersky, Contract Coordinator
Office of the City Administrator

SUBJECT: Personal Services Contract (PSC) 44328
Objections from International Association of Machinist and Aerospace Workers
District Lodge 190, Local 1414 (Local 1414)

We are writing to request approval of subject PSC and to report on discussions between Local 1414 and the department.

The department requested this PSC because we were advised to secure them using a PSC. In the past, services have been provided using individual purchase orders for each repair or service necessary for special equipment and vehicles. We were advised to secure the services using a PSC. The repair parts and services are only available from the manufacturer of the piece of equipment. The manufacturers have proprietary rights to the software necessary. We anticipate no more services being provided using this PSC than are currently provided.

The City and Local 1414 have met concerning this PSC and exchanged numerous emails. Local 1414 has not agreed to remove their objections.

Please see emails dated October 15, October 19, and November 9, 1920 for details as to L 1414 objections. We would summarize their objections as being that the City could secure the parts necessary and their members could be trained to do the work.

We respectfully request approval of PSC 44328.

Thank you for your consideration.

Personal Services Contract (PSC) 44328

Fleet/Shops emails with Machinists Local 1414

Equipment Maintenance

Date	To/From and Topic
10.13.20	Notice of receipt for PSC 44328; sent to union representative on DHR list
10.15.20	Email from Mark Jayne, Local 1414, to City asking for more information
10.15.20	Email from City to 1414 attaching 10.2.10 background list
10.19.20	From 1414 objecting to PSC stating the City can purchase parts
10.21.20	To 1414 City response, providing background and services to be provided
11.9.20	From 1414 objecting to PSC again; states that employees can be trained
11.10.20	To 1414 City inviting to meet
11.14.20	From 1414 agreeing to meet
11.16.20	From 1414 asking about equipment
11.16.20	To 1414 request to meet?
11.18.20	To 1414 providing list of equipment/vehicles
11.18.20	To 1414 from City reviewing meeting held that day, responding to questions, referencing 1414's request to do research and provide additional information
11.29.20	To 1414 requesting response to 11.18 email re: moving forward on PSC
12.8.20	To 1414 requesting the additional information they said they would research
12.10.20	From 1414 reporting their research that they don't have control over the interfaces; manufacturer wants to do the work. Requests clearer information of any services to be provided.
12.14.20	To 1414. Response to 12.10 email re: services and advise of re: need to move forward to CSC

From: dhrrpscordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
To: [Lubamersky, Joan \(ADM\); oashworth@ibew6.org; khughes@ibew6.org; agonzalez@iam1414.org; speedy4864@aol.com](mailto:Lubamersky,Joan(ADM);oashworth@ibew6.org;khughes@ibew6.org;agonzalez@iam1414.org;speedy4864@aol.com); [Lubamersky, Joan \(ADM\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Lubamersky,Joan(ADM);DHR-PSCCoordinator,DHR(HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 44328 - 20/21
Date: Tuesday, October 13, 2020 2:20:23 PM

RECEIPT for Union Notification for PSC 44328 - 20/21 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 44328 - 20/21 for \$800,000 for Initial Request services for the period 01/04/2021 – 01/03/2026. 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/dhrrupal/node/15628> 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

From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#)
Cc: ["DHR-PSCCoordinator, DHR \(dhr-psccordinator@sfgov.org\)"](#)
Subject: RE: PSC 44328
Date: Thursday, October 15, 2020 12:51:00 PM
Attachments: [Receipt of Notice for new PCS over \\$100K PSC # 44328 - 20 21.pdf](#)
[PSC 44328 20.21 as posted 10.13.20.pdf](#)
[Background on vehicle repair PSC.pdf](#)

Hello Mr. Jayne

Thank you for contacting me concerning this Personal Services Contract (PSC) request.

The union notification was sent to the Arthur Gonzales, as he is listed on the Department of Human Resources PSC website as contact for Machinists 1414. I have copied the DHR PSC Coordinator.

You asked what vehicles would be involved and how these services were provided in the past. Please see the "Background" document attached. This work must be performed by manufacturer trained and certified technicians as the diagnostic tools are proprietary.

These specialized services were provided by contract secured through a purchase order. We were advised we should do so by PSC.

Please "Reply All" to let me know if this responds to your concerns or if you would like additional information.

Thank you.

Sincerely,
Joan

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

Don't miss out! Do the 2020 Census today!

-----Original Message-----

From: Mark Jayne <mjayne@iam1414.org>
Sent: Thursday, October 15, 2020 12:22 PM
To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>
Subject: PSC 44328

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

Dear Joan Lubamersky,

My name is Mark Jayne and I am the Business Representative for Machinist LL1414. I am writing in response to the Personal Service Contract listed above. In the document it states that the Machinist were contacted

concerning this item. In the last year, we have had a change in Representative's, so I am certain that what you sent was sent to the wrong address.

This work is Machinist work through and through. I would like to see more specific detail as to the work to be performed and on what vehicles, as well as, who provided these services prior to this contract. Thank you for your attention to this matter.

I can be reached using the following information,

Thank you sincerely,

Mark Jayne
650-762-4602
Mjayne@iam1414.org
District Lodge 190 LL1414
International Assoc. of Machinist
and Aerospace Worker's

From: [Mark Jayne](#)
To: [Lubamersky, Joan \(ADM\)](#)
Subject: PSC 44328
Date: Thursday, October 15, 2020 12:22:26 PM

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

Dear Joan Lubamersky,

My name is Mark Jayne and I am the Business Representative for Machinist LL1414. I am writing in response to the Personal Service Contract listed above. In the document it states that the Machinist were contacted concerning this item. In the last year, we have had a change in Representative's, so I am certain that what you sent was sent to the wrong address.

This work is Machinist work through and through. I would like to see more specific detail as to the work to be performed and on what vehicles, as well as, who provided these services prior to this contract. Thank you for your attention to this matter.

I can be reached using the following information,

Thank you sincerely,

Mark Jayne
650-762-4602
Mjayne@iam1414.org
District Lodge 190 LL1414
International Assoc. of Machinist
and Aerospace Worker's

From: [Mark Jayne](#)
To: [Lubamersky, Joan \(ADM\)](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Re: PSC 44328
Date: Monday, October 19, 2020 9:16:02 AM

I do disagree with is this PSC.

We, as Machinist 1414, do now and have, historically, done this work. We have been factory trained and will seek to further that education as our CBA allows for that very thing. The City, itself, will purchase OEM parts, as it does throughout it's many departments currently. Training of our rank and file, who currently work on Sweepers and Suction Trucks, is covered under our current M.O.U.,

7/01/2019-6/30/2020, Sect. IV. I.

#268 & #269

Sent from my iPhone

> On Oct 15, 2020, at 12:53 PM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:

>

> Hello Mr. Jayne

>

> Thank you for contacting me concerning this Personal Services Contract (PSC) request.

>

> The union notification was sent to the Arthur Gonzales, as he is listed on the Department of Human Resources PSC website as contact for Machinists 1414. I have copied the DHR PSC Coordinator.

>

> You asked what vehicles would be involved and how these services were provided in the past. Please see the "Background" document attached. This work must be performed by manufacturer trained and certified technicians as the diagnostic tools are proprietary.

>

> These specialized services were provided by contract secured through a purchase order. We were advised we should do so by PSC.

>

> Please "Reply All" to let me know if this responds to your concerns or if you would like additional information.

>

> Thank you.

>

> Sincerely,

> Joan

>

> Joan Lubamersky

> Office of the City Administrator

> One Carlton B. Goodlett Place, Room 362

> San Francisco, CA 94102

>

>

> Don't miss out! Do the 2020 Census today!

>

>

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>

> -----Original Message-----

> From: Mark Jayne <mjayne@iam1414.org>

> Sent: Thursday, October 15, 2020 12:22 PM

> To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>

> Subject: PSC 44328

>

>

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

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>

>

> Dear Joan Lubamersky,

> My name is Mark Jayne and I am the Business Representative for Machinist LL1414. I am writing in response to the Personal Service Contract listed above. In the document it states that the Machinist were contacted concerning this item. In the last year, we have had a change in Representative's, so I am certain that what you sent was sent to the wrong address.

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> This work is Machinist work through and through. I would like to see more specific detail as to the work to be performed and on what vehicles, as well as, who provided these services prior to this contract. Thank you for your attention to this matter.

>

> I can be reached using the following information,

>

> Thank you sincerely,

>

> Mark Jayne

> 650-762-4602

> Mjayne@iam1414.org

> District Lodge 190 LL1414

> International Assoc. of Machinist

> and Aerospace Worker's

>

>

>

> <Receipt of Notice for new PCS over \$100K PSC # 44328 - 20_21.pdf>

> <PSC 44328 20.21 as posted 10.13.20.pdf>

> <Background on vehicle repair PSC.pdf>

From: Lubamersky, Joan (ADM)
To: ["Mark Jayne"](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: RE: PSC 44328
Date: Wednesday, October 21, 2020 4:56:00 PM

Dear Mr. Jayne

I discussed this matter with the Fleet Management/Central Shops department, and am pleased to provide additional information.

The majority of work performed by the department is performed in-house. Consistent with the sections you cite from your MOU, the department provides training to your members for that work. This includes standard vehicle repair services associated with vehicle chassis, engine or transmissions of general vehicle manufacturer brands, such as Ford, Peterbilt, Freightliner and International. Mounted equipment such as wearable sweeper items (i.e. brushes, pick up heads, hopper components and conveyor system), sewer cleaning wearable items (i.e. suction hoses, water jetting hoses, wands and hopper related components).

For the specialty TYMCO, ELGIN and VAC-CON equipped vehicles, however, manufacturers have proprietary rights to their parts and services, which are only available from authorized dealers. The City does not have access to the proprietary diagnostic tools/software to perform these repairs.

The manufacturer requires services by manufacturer-trained/certified technicians with access to the manufacturer's proprietary diagnostic tools and software with comprehensive and extensive knowledge of TYMCO/ELGIN/VAC-CON brand equipment. They require specific expertise to diagnose, inspect, test, remove, repair, and install all components and advanced features, such as sweeper engine electronic controls, broom and pick up head hydraulic control system, electrical wiring, sewer cleaning electronic control systems and sewer cleaning hydraulic control systems.

Guarantees on this specialty equipment would be voided if City employees serviced them.

These specialty repairs have been performed by the manufacturer's representatives for some time using another City purchasing method, a purchase order. We have now been advised to procure them using a personal services contract. We do not anticipate any change in the work currently performed by your members.

Please let me know if you have any questions.

If you have no objection to this Personal Services Contract moving forward, please Reply All to also inform the Department of Human Resources.

Thank you.

Best regards,

Joan

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

-----Original Message-----

From: Mark Jayne <mjayne@iam1414.org>

Sent: Monday, October 19, 2020 9:16 AM

To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>

Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

Subject: Re: PSC 44328

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Sent from my iPhone

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From: [Mark Jayne](#)
To: [Lubamersky, Joan \(ADM\)](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Re: PSC 44328
Date: Monday, November 9, 2020 9:54:09 AM

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> To: 'Mark Jayne' <mjayne@iam1414.org>
> Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

> Subject: RE: PSC 44328
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>> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102
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From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: RE: PSC 44328
Date: Tuesday, November 10, 2020 1:53:00 PM

Hello Mr. Jayne

We would like very much to meet with you to discuss his further.

Would you be available to meet via Microsoft Teams with Don Jones from Fleet Management and me? Times we suggest are Tuesday, November 17 any time between 11 AM and 4 PM or Wednesday, November 18 from 11 AM to Noon.

Please let me know if this works for you.

Thank you very much.

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Cc: ["DHR-PSCCoordinator, DHR \(dhr-psccordinator@sfgov.org\)"](#)
Subject: FW: PSC 44328
Date: Saturday, November 14, 2020 11:52:00 AM

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From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#); [Jones, Don \(ADM\)](#)
Subject: RE: PSC 44328
Date: Monday, November 16, 2020 1:36:00 PM

Hello Mr. Jayne

Don Jones from Fleet Management sent you a message inviting you to a meeting via Microsoft Teams on Wednesday. It doesn't appear that you responded to that invitation.

Do you do meetings on Microsoft Teams? If not, we can talk on a conference call or find another way.

Thank you very much.

Best regards,

Joan

-----Original Message-----

From: Mark Jayne <mjayne@iam1414.org>
Sent: Saturday, November 14, 2020 12:10 PM
To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>
Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Re: PSC 44328

Thank you Joan. Wed. Nov. 18, 2020 at 11am works for my schedule.

Mark Jayne
650-762-4602
Mjayne@iam1414.org

Sent from my iPhone

> On Nov 14, 2020, at 11:52 AM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:
>
> Hello Mr. Jayne. I am following up on my email below. Please let me know if you are available to meet with Don Jones and me at any of the times suggested.
>
> Thank you.
>
> Sincerely
> Joan Lubamersky
> Office of the City Administrator
> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102
>
>
>
>
>
>
> -----Original Message-----
> From: Lubamersky, Joan (ADM)
> Sent: Tuesday, November 10, 2020 1:54 PM
> To: Mark Jayne <mjayne@iam1414.org>

> Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
> Subject: RE: PSC 44328
>
> Hello Mr. Jayne
>
> We would like very much to meet with you to discuss his further.
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> Would you be available to meet via Microsoft Teams with Don Jones from Fleet Management and me? Times we suggest are Tuesday, November 17 any time between 11 AM and 4 PM or Wednesday, November 18 from 11 AM to Noon.
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> Please let me know if this works for you.
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> Sincerely,
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> Joan Lubamersky
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> From: Mark Jayne <mjayne@iam1414.org>
> Sent: Monday, November 9, 2020 9:54 AM
> To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>
> Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
> Subject: Re: PSC 44328
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> We OBJECT to this Personal Services Contract. Our personnel are fully well capable and willing to work on this equipment. If the City responds effectively enough, our workforce can get the training/certification necessary to complete whatever tasks need fulfilling. There doesn't seem to be an adequate reason why the city can not obtain the necessary, proprietary certification for tools, software and parts. There is, at least, \$800,000 available to assure that those requirements be met. I am of the belief that the city wants the Machinists to continue the quality of work they already perform, well into the future. By not extending this PSC, that can help secure the quality the City has come to expect.
>
> Sincerely,
>
> Mark Jayne
> 650-762-4602
> Mjayne@iam1414.org
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> Sent from my iPhone
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>>> On Nov 5, 2020, at 3:26 PM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:
>> Hello Mr. Jayne.
>> I am following up on the email below.
>> If this responds to your questions and you have no objection to this
>> Personal Services Contract moving forward, please Reply All to also inform the Department of Human Resources.
>> Thank you.
>> Best regards,
>> Joan
>> Joan Lubamersky
>> Office of the City Administrator
>> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102
>> -----Original Message-----
>> From: Lubamersky, Joan (ADM)
>> Sent: Wednesday, October 21, 2020 4:56 PM

>> To: 'Mark Jayne' <mjayne@iam1414.org>
>> Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
>> Subject: RE: PSC 44328
>> Dear Mr. Jayne
>> I discussed this matter with the Fleet Management/Central Shops department, and am pleased to provide additional information.
>> The majority of work performed by the department is performed in-house. Consistent with the sections you cite from your MOU, the department provides training to your members for that work. This includes standard vehicle repair services associated with vehicle chassis, engine or transmissions of general vehicle manufacturer brands, such as Ford, Peterbilt, Freightliner and International. Mounted equipment such as wearable sweeper items (i.e. brushes, pick up heads, hopper components and conveyor system), sewer cleaning wearable items (i.e. suction hoses, water jetting hoses, wands and hopper related components).
>> For the specialty TYMCO, ELGIN and VAC-CON equipped vehicles, however, manufacturers have proprietary rights to their parts and services, which are only available from authorized dealers. The City does not have access to the proprietary diagnostic tools/software to perform these repairs.
>> The manufacturer requires services by manufacturer-trained/certified technicians with access to the manufacturer's proprietary diagnostic tools and software with comprehensive and extensive knowledge of TYMCO/ELGIN/VAC-CON brand equipment. They require specific expertise to diagnose, inspect, test, remove, repair, and install all components and advanced features, such as sweeper engine electronic controls, broom and pick up head hydraulic control system, electrical wiring, sewer cleaning electronic control systems and sewer cleaning hydraulic control systems.
>> Guarantees on this specialty equipment would be voided if City employees serviced them.
>> These specialty repairs have been performed by the manufacturer's representatives for some time using another City purchasing method, a purchase order. We have now been advised to procure them using a personal services contract. We do not anticipate any change in the work currently performed by your members.
>> Please let me know if you have any questions.
>> If you have no objection to this Personal Services Contract moving forward, please Reply All to also inform the Department of Human Resources.
>> Thank you.
>> Best regards,
>> Joan
>> Joan Lubamersky
>> Office of the City Administrator
>> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102
>> -----Original Message-----
>> From: Mark Jayne <mjayne@iam1414.org>
>> Sent: Monday, October 19, 2020 9:16 AM
>> To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>
>> Cc: DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
>> Subject: Re: PSC 44328
>> I do disagree with is this PSC.
>> We, as Machinist 1414, do now and have, historically, done this work. We have been factory trained and will seek to further that education as our CBA allows for that very thing. The City, itself, will purchase OEM parts, as it does throughout it's many departments currently. Training of our rank and file, who currently work on Sweepers and Suction Trucks, is covered under our current M.O.U., 7/01/2019-6/30/2020, Sect. IV. I.
>> #268 & #269
>> Sent from my iPhone
>>>>> On Oct 15, 2020, at 12:53 PM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:
>>> Hello Mr. Jayne
>>> Thank you for contacting me concerning this Personal Services Contract (PSC) request.
>>> The union notification was sent to the Arthur Gonzales, as he is listed on the Department of Human Resources PSC website as contact for Machinists 1414. I have copied the DHR PSC Coordinator.
>>> You asked what vehicles would be involved and how these services were provided in the past. Please see the "Background" document attached. This work must be performed by manufacturer trained and certified technicians as the diagnostic tools are proprietary.
>>> These specialized services were provided by contract secured through a purchase order. We were advised we should do so by PSC.

>>> Please "Reply All" to let me know if this responds to your concerns or if you would like additional information.

>>> Thank you.

>>> Sincerely,

>>> Joan

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>>> Office of the City Administrator

>>> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102

>>> Don't miss out! Do the 2020 Census today!

>>> -----Original Message-----

>>> From: Mark Jayne <mjayne@iam1414.org>

>>> Sent: Thursday, October 15, 2020 12:22 PM

>>> To: Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org>

>>> Subject: PSC 44328

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>>> Dear Joan Lubamersky,

>>> My name is Mark Jayne and I am the Business Representative for Machinist LL1414. I am writing in response to the Personal Service Contract listed above. In the document it states that the Machinist were contacted concerning this item. In the last year, we have had a change in Representative's, so I am certain that what you sent was sent to the wrong address.

>>> This work is Machinist work through and through. I would like to see more specific detail as to the work to be performed and on what vehicles, as well as, who provided these services prior to this contract.Ok Thank you for your attention to this matter.

>>> I can be reached using the following information,

>>> Thank you sincerely, Mark Jayne

>>> 650-762-4602

>>> Mjayne@iam1414.org

>>> District Lodge 190 LL1414

>>> International Assoc. of Machinist

>>> and Aerospace Worker's

>>> <Receipt of Notice for new PCS over \$100K PSC # 44328 - 20_21.pdf>

>>> <PSC 44328 20.21 as posted 10.13.20.pdf> <Background on vehicle

>>> repair PSC.pdf>

From: [Mark Jayne](#)
To: [Lubamersky, Joan \(ADM\)](#)
Subject: Re: PSC 44328
Date: Monday, November 16, 2020 12:14:46 PM

Hello Joan, We would like to have a list of the equipment, Elgin, Tymco and Vac-Con models being referred to in these communications, before our phone mtg on Wed. 11am.

Thank you,

Mark Jayne

Sent from my iPhone

> On Nov 15, 2020, at 1:20 PM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:

>

> Hello Mark.

>

> This is good for me. I've asked Don Jones from Fleet/Shops if it is still OK for him. I believe he will send us both an invitation to a Microsoft Teams meeting.

>

> Joan

>

> -----Original Message-----

> From: Mark Jayne <mjayne@iam1414.org>

> Sent: Saturday, November 14, 2020 12:10 PM

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>> One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102

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>>>> <Receipt of Notice for new PCS over \$100K PSC # 44328 - 20_21.pdf>

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>>>> repair PSC.pdf>

From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#)
Cc: [Jones, Don \(ADM\)](#)
Subject: Follow up to meeting 11.18.20
Date: Wednesday, November 18, 2020 12:54:00 PM
Attachments: [PSC 44328 20.21 as posted 10.13.20.pdf](#)

Dear Mark

I am writing to follow up on the meeting we had this morning with Don and Brian from Fleet Management concerning PSC 44328.

After our conversation, you said you wanted to do further research. You said you are not able to provide a date for your response, and you would do the research as quickly as possible.

One point that was not specified during our talk is that the proposed contract is for five years. I've attached a copy of the PSC as posted on the DHR PSC website.

We look forward to talking with you further.

Best regards,

Joan
Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#); [Jones, Don \(ADM\)](#)
Cc: ["DHR-PSCCoordinator, DHR \(dhr-psccordinator@sfgov.org\)"](#)
Subject: FW: Follow up to meeting 11.18.20
Date: Sunday, November 29, 2020 11:40:00 AM
Attachments: [PSC 44328 20.21 as posted 10.13.20.pdf](#)

Dear Mark.

I am writing to follow up on our conversation of November 18, 2020.

We look forward to hearing from you.

Thank you.

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Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
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Cc: Jones, Don (ADM) <don.jones@sfgov.org>
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From: [Lubamersky, Joan \(ADM\)](#)
To: [Mark Jayne](#)
Cc: "[DHR-PSCCoordinator, DHR \(dhr-psccordinator@sfgov.org\)](#)"
Subject: FW: Follow up to meeting 11.18.20
Date: Tuesday, December 8, 2020 2:40:00 PM
Attachments: [PSC 44328 20.21 as posted 10.13.20.pdf](#)

Dear Mark:

I am writing to follow up on the emails below concerning PSC 44328 20.21

You said you would have additional information as soon as possible. We have not heard back from you.

We plan to move forward with this PSC at noon on Thursday, December 10.

Sincerely,

Joan

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

From: Lubamersky, Joan (ADM)
Sent: Sunday, November 29, 2020 11:40 AM
To: Mark Jayne <mjayne@iam1414.org>; Jones, Don (ADM) <don.jones@sfgov.org>
Cc: 'DHR-PSCCoordinator, DHR (dhr-psccordinator@sfgov.org)' <dhr-psccordinator@sfgov.org>
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From: [Mark Jayne](#)
To: [Lubamersky, Joan \(ADM\)](#); [Jones, Don \(ADM\)](#); [Pedro j Mendez](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Re: Follow up to meeting 11.18.20
Date: Thursday, December 10, 2020 11:31:13 AM

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Although I have been checking into this situation, I understand that we don't have the control of the interface that we should be able to have. I understand that each manufacturer has it's own way of keeping their own people working. My concern is with, what appears to be, a PSC that would include an outside source doing the standard work that we perform currently. We need a clearer definition as to what this PSC covers that is currently our work.

Mark Jayne
650-762-4602
Mjayne@iam1414.org

On Dec 8, 2020, at 2:41 PM, Lubamersky, Joan (ADM)
<joan.lubamersky@sfgov.org> wrote:

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To: [Mark Jayne](#); [Jones, Don \(ADM\)](#); [Pedro j Mendez](#)
Cc: [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: RE: Follow up to meeting 11.18.20
Date: Monday, December 14, 2020 1:33:00 PM

Mark:

We will be using services provided under the PSC for work we cannot perform due to not being able to buy the software/equipment to do so. There may be intermittent as-needed work provided by the vendor.

As I believe we have pointed out, we do not intend to do more business with these companies than we do now. We are just changing the way we procure the services in order to avoid issuing a separate purchase order each time we need these services.

We have been in discussion with you regarding this PSC for some time after you contacted us on October 15, 2020. The department needs to move forward to secure these services. We will therefore move forward now with the Department of Human Resources and the Civil Service Commission.

Sincerely,
Joan

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Mjayne@iam1414.org

On Dec 8, 2020, at 2:41 PM, Lubamersky, Joan (ADM) <joan.lubamersky@sfgov.org> wrote:

Dear Mark:

I am writing to follow up on the emails below concerning PSC 44328 20.21

You said you would have additional information as soon as possible. We have not heard back from you.

We plan to move forward with this PSC at noon on Thursday, December 10.

Sincerely,

Joan

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

From: Lubamersky, Joan (ADM)
Sent: Sunday, November 29, 2020 11:40 AM
To: Mark Jayne <mjayne@iam1414.org>; Jones, Don (ADM) <don.jones@sfgov.org>
Cc: 'DHR-PSCCoordinator, DHR (dhrrpscordinator@sfgov.org)' <dhrrpscordinator@sfgov.org>
Subject: FW: Follow up to meeting 11.18.20

Dear Mark.

I am writing to follow up on our conversation of November 18, 2020.

We look forward to hearing from you.

Thank you.

Sincerely,

Joan Lubamersky
Office of the City Administrator
One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

From: Lubamersky, Joan (ADM)
Sent: Wednesday, November 18, 2020 12:54 PM
To: Mark Jayne <mjayne@iam1414.org>
Cc: Jones, Don (ADM) <don.jones@sfgov.org>
Subject: Follow up to meeting 11.18.20

Dear Mark

I am writing to follow up on the meeting we had this morning with Don and Brian from Fleet Management concerning PSC 44328.

After our conversation, you said you wanted to do further research. You said you are not able to provide a date for your response, and you would do the research as quickly as possible.

One point that was not specified during our talk is that the proposed contract is for five years. I've attached a copy of the PSC as posted on the DHR PSC website.

We look forward to talking with you further.

Best regards,

Joan
Joan Lubamersky
Office of the City Administrator

One Carlton B. Goodlett Place, Room 362
San Francisco, CA 94102

<PSC 44328 20.21 as posted 10.13.20.pdf>

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN

Dept. Code: ADM

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 37308 - 17/18)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: web hosting services

Funding Source: General fund

PSC Original Approved Amount: \$79,200

PSC Original Approved Duration: 03/26/18 - 03/31/21 (3 years 6 days)

PSC Mod#1 Amount: \$96,000

PSC Mod#1 Duration: 03/26/18-03/31/24 (3 years 1 day)

PSC Cumulative Amount Proposed: \$175,200

PSC Cumulative Duration Proposed: 6 years 1 week

1. Description of Work

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

Vendor will perform web hosting services for the "boards and commissions" software for the 3-1-1 program. The vendor will maintain the software and provide periodic updates remotely.

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

Software is needed to comply with the requirement for an online Centralized Commission Database that can be accessed by the public to identify opportunities for appointments to boards and commissions and learn how to apply. The vendor's "boards and commissions" software is readily available and designed to input the information required by the legislation. This includes member names, term dates, and appointing authorities, and board details including term length and limits, vacancies, contact information, qualifications necessary, and application guidelines. Denial of this software agreement would make it difficult to comply with the legislation to establish and maintain a centralized, online board and commission database and produce quarterly reports. See Administrative Code Section 157.1 through 157.5 attached.

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?

Yes

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 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:

Vendor has proprietary software to perform these services.

B. Reason for the request for modification:

Additional services required.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Database and WEB experience. Possession of proprietary software.

B. Which, if any, civil service class(es) normally perform(s) this work? 1042, IS Engineer-Journey; 1052, IS Business Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Proprietary software

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.

During initial review (for the first Agreement), The Department of Technology (DT) indicated that they could not build and support an application that met the requirements of the legislation. For this second SaaS Agreement, DT reconfirmed that "there is no available resource in DT that can be used before contracting for services." Public Works, Controller, General Services Agency, Treasurer-Tax Collector and others were also contracted and unable to assist.

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 employees would not have access to the proprietary software required.

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 contract? 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.
No.

7. Union Notification: On 12/22/20, 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# 37308 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
Sent: Monday, December 21, 2020 11:58 PM
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 # 37308 - 17/18 - 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 \$96,000 for services for the period March 26, 2018 – March 31, 2024. 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/15878>

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)



OFFICE OF THE CITY ADMINISTRATOR



London N. Breed, Mayor
Naomi M. Kelly, City Administrator

December 21, 2020

MEMORANDUM

TO: Honorable Civil Service Commission

FROM: Joan Lubamersky, Contract Coordinator
Office of the City Administrator

SUBJ: Proposed Personal Services Contract (PSC) 37308 17/18 Modification
Duration Over Five Years
3-1-1 Customer Service Center (SF311)

We are writing to request authorization for a five- and one-half year duration for this PSC

The 311 Customer Service Center is charged with establishing and maintaining a centralized, publicly accessible database of information concerning appointments to all CCSF boards, commissions, task forces, and committees. The database is required by Ordinance No. 265-10, Sections 1.57-1 through 1.57.5. This vendor's "boards and commissions" software is readily available and designed to manage the input and public access of information required by the legislation. This information includes a roster of members, appointing authorities, vacant seats, qualifications necessary, and application guidelines for each entity. Extending the duration of PSC# 37308 - 17/18 is needed to ensure that SF311 can continue to provide this publicly accessible database, as required. At the end of this modification, SF311 will reevaluate the availability and qualifications of City staff to see if they can meet the needs of this complex legislated platform.

Thank you for your consideration.

Copy to: Nancy Alfaro
Director, SF 311

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADMDept. Code: ADMType of Request: ☒ Initial ☐ Modification of an existing PSC (PSC # _____)Type of Approval: ☒ Expedited ☐ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)Type of Service: web hosting servicesFunding Source: General fundPSC Duration: 3 years 6 daysPSC Amount: \$79,200**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Vendor will perform web hosting services for the "boards and commissions" software for the 3-1-1 program. The vendor will maintain the software and provide periodic updates remotely.

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

Software is needed to comply with the requirement for an online Centralized Commission Database that can be accessed by the public to identify opportunities for appointments to boards and commissions and learn how to apply. The vendor's "boards and commissions" software is readily available and designed to input the information required by the legislation. This includes member names, term dates, and appointing authorities, and board details including term length and limits, vacancies, contact information, qualifications necessary, and application guidelines. Denial of this software agreement would make it difficult to comply with the legislation to establish and maintain a centralized, online board and commission database and produce quarterly reports. See Administrative Code Section 157.1 through 157.5 attached.

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 has been provided by contract.

D. Will the contract(s) be renewed?

Yes

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):**

☒ 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).

B. Explain the qualifying circumstances:

Vendor has proprietary software to perform these services.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Database and WEB experience. Possession of proprietary software.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1042, IS Engineer-Journey; 1052, IS Business Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Proprietary software

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.
During initial review (for the first Agreement), The Department of Technology (DT) indicated that they could not build and support an application that met the requirements of the legislation. For this second SaaS Agreement, DT reconfirmed that "there is no available resource in DT that can be used before contracting for services." Public Works, Controller, General Services Agency, Treasurer-Tax Collector and others were also contracted and unable to assist.
- 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 employees would not have access to the proprietary software required.

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 contract? 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.
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. Union Notification: On 01/17/2018, 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# 37308 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/26/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES

Dept. Code: HRD

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 35440 - 19/20)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Development and Administration of Exam for Fire Class H030 Captain

Funding Source: General Fund

PSC Original Approved Amount: \$75,000

PSC Original Approved Duration: 04/01/20 - 06/30/23 (3 years 12 weeks)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 07/01/23-06/30/24 (1 year 1 day)

PSC Mod#2 Amount: \$80,000

PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$155,000

PSC Cumulative Duration Proposed: 4 years 13 weeks

1. Description of Work

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

Provide expert test development consultation for the H030 Fire Captain selection process and defend that selection process against legal challenge as necessary.

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

The service is necessary because Fire Department selection processes have historically been litigious. The consultant will provide expert guidance and defend the City in the event of litigation.

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 35440 - 19/20

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:

The contractor has the credentials and expertise to provide expert testimony in State and Federal court.

B. Reason for the request for modification:

Due to COVID, in-person ratings were replaced with virtual ratings. The modification will increase the total compensation to cover rater reimbursement, shipping, and processing fees.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Contractor must have extensive and current knowledge of psychometrics and statistical analysis, and experience providing depositions and testifying as an expert witness in State and Federal courts.
- B. Which, if any, civil service class(es) normally perform(s) this work?
0931, Manager III; 1244, Senior Human Resources Analyst; 1246, Principal Human Resources 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.
Civil services classes are not applicable because staff do not have the credentials to provide expert testimony in court.
- 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 would not be practical to adopt a new civil service class because human resource analysts perform the majority of tasks related to development and administration of the selection process.

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 contract? If so, please explain what that will entail; if not, explain why not.
There will be no formalized training. However, there will be a transfer of knowledge by working with the contractor. The contractor will share new best practices and innovations to creating defensible methodologies.
- 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.
Berkeley Research Group

7. Union Notification: On 12/18/20, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association; 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: Ian Hart Phone: 415-557-4912 Email: Ian.Hart@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35440 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of Ian.Hart@sfgov.org
Sent: Friday, December 18, 2020 3:58 PM
To: Hart, Ian (HRD); Laxamana, Junko (BOS); Criss@SFMEA.com; camaguey@sfmea.com (contact); 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; Brusaca, Christina; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 35440 - 19/20 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The HUMAN RESOURCES -- HRD has submitted a modification request for a Personal Services Contract (PSC) for \$80,000 for services for the period December 18, 2020 – June 30, 2024. 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/14824>

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 staff@sfmea.com Christina@sfmea.com Camaguey@sfmea.com Criss@SFMEA.com junko.laxamana@sfgov.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES

Dept. Code: HRD

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 35440 - 19/20)

Type of Approval: ☒ Expedited ☐ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Development and Administration of Exam for Fire Class H030 Captain

Funding Source: General Fund

PSC Original Approved Amount: \$75,000

PSC Original Approved Duration: 04/01/20 - 06/30/23 (3 years 12 weeks)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 07/01/23-06/30/24 (1 year 1 day)

PSC Cumulative Amount Proposed: \$75,000

PSC Cumulative Duration Proposed: 4 years 13 weeks

1. Description of Work

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

Provide expert test development consultation for the H030 Fire Captain selection process and defend that selection process against legal challenge as necessary.

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

The service is necessary because Fire Department selection processes have historically been litigious. The consultant will provide expert guidance and defend the City in the event of litigation.

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 35440 - 19/20

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:

The contractor has the credentials and expertise to provide expert testimony in State and Federal court.

B. Reason for the request for modification:

The exam timeline may be delayed due to COVID-19. The PSC is extended to cover the potential delay.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must have extensive and current knowledge of psychometrics and statistical analysis, and experience providing depositions and testifying as an expert witness in State and Federal courts.

B. Which, if any, civil service class(es) normally perform(s) this work? 1244, Senior Personnel Analyst; 1246, Principal Personnel Analyst; 0931, Manager III; 1244, Senior Human Resources Analyst; 1246, Principal Human Resources 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.

Civil services classes are not applicable because staff do not have the credentials to provide expert testimony in court.

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 would not be practical to adopt a new civil service class because human resource analysts perform the majority of tasks related to development and administration of the selection process.

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 contract? If so, please explain what that will entail; if not, explain why not.
There will be no formalized training. However, there will be a transfer of knowledge by working with the contractor. The contractor will share new best practices and innovations to creating defensible methodologies.
- 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. Union Notification: On 04/15/20, the Department notified the following employee organizations of this PSC/RFP request: Municipal Executive Association; 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: Ian Hart Phone: 415-557-4912 Email: Ian.Hart@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35440 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 04/23/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: JUVENILE PROBATION

Dept. Code: JUV

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 43740 - 17/18)

Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)

Type of Service: Physical Education, Exercise & Recreation Program for Youth in Juvenile Detention Facilities

Funding Source: Grant/General Fund

PSC Original Approved Amount: \$600,000

PSC Original Approved Duration: 11/01/17 - 11/01/19 (2 years)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 11/06/18-06/30/20 (34 weeks 4 days)

PSC Mod#2 Amount: no amount added

PSC Mod#2 Duration: 07/01/20-12/31/21 (1 year 26 weeks)

PSC Cumulative Amount Proposed: \$600,000

PSC Cumulative Duration Proposed: 4 years 8 weeks

1. Description of Work

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

The Juvenile Probation Department (JPD) operates two 24-hour/7-day a week residential facilities for youth: Juvenile Hall and Log Cabin Ranch(located in La Honda CA). The Board of State & Community Corrections (BSCC) Title 15 minimum standards for juvenile facilities mandates physical education as a "required element" of the facility education program and on-grounds school. In order to comply with the State Education Code, applicable federal education statutes and regulations, JPD must ensure that it has a highly effective physical education program, in order to maximize the amount of time youth are out of their rooms and not confined to their beds. Per BSCC, Article 6, Programs and Activities, Section 1371, juvenile facilities must provide a daily supervised exercise, activity and recreation program, that includes "large muscle activity each day" as well as outdoor activity. The Welfare and Institutions Code (WIC), Division 2 requires that residential programs provide competency-based education services, training, and physical education, for wards of the Juvenile Court.

To comply with all statutes and regulations regarding youth who are confined to juvenile detention facilities, JPD is seeking a supplier to develop and implement a safe, compliant, comprehensive and structured physical education, exercise, activity, and recreation program that includes evidence-based instructional strategies to respond to youth with different learning styles and abilities.

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

This service is necessary because juvenile detention facilities are mandated by state and federal statutes and regulations, the State Education Code, the Board of State and Community Corrections, and the Welfare and Institutions Code to provide them. To comply, JPD must ensure that it has a

diversified on-site physical education program and services that are available for youth ranging in age from 9 to 19, that can be administered within the structure of a juvenile detention facility. Without this service, the City will be unable to comply with the applicable regulations that govern the care and custody of youth who are wards of the Juvenile Court and under the supervision of the Juvenile Probation Department.

- 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 service has been independently contracted out for in the past.

- D. Will the contract(s) be renewed?

Duration of the contract is expected to be 2 years (24 months) from the start of contract services, with an option to renew one time for 2 additional years (24 months). Therefore, if the option to extend is exercised by the City, the maximum term of the contract will be 4 years (48 months).

- 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:

Duration of the contract is expected to be 2 years (24 months) from the start of contract services, with an option to renew one time for 2 additional years (24 months). Therefore, if the option to extend is exercised by the City, the maximum term of the contract will be 4 years (48 months).

2. Reason(s) for the Request

- A. Display all that apply

☒ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The Juvenile Probation Department (JPD) operates two 24-hour/7-day a week residential facilities for youth: Juvenile Hall and Log Cabin Ranch (located in La Honda CA). JPD reviewed City classes and did not find a classification that matches the requisite skill-sets and abilities to perform the full range of services that are needed. The contractor must be available to come on-site at the 2 detention facilities: The services needed by JPD require a level of expertise that would include knowledge, skills, and experience in developing and administering a structured physical education curriculum/program for the 2 on-grounds schools that must comply with the State Education Code, the County Board of Education policies, the Board of State and Community Corrections Title 15 minimum standards for juvenile facilities, all applicable federal education statutes and regulations. To comply with statutes and regulations regarding youth who are confined to juvenile detention facilities, JPD is seeking a contractor to develop and implement a safe, compliant, comprehensive and structured physical education, exercise, activity, and recreational program that includes evidence-based instructional strategies to respond to youth with different learning styles and abilities.

- B. Reason for the request for modification:

Modification is required to match the term and of PSC to the term of the contract. Contract is extending contract for one year to 12/31/2021.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Instructors must be able to pass a specialized security and criminal background check clearance. Required skills and expertise include education, training and experience in creating effective and literate gender-specific and co-ed physical education programs. Services must be administered by skillful instructors who are trained and proficient in isometrics, calisthenics, aerobics, conditioning, and sports for both girls and boys. Instructors must be knowledgeable about trauma-informed issues that impact at-risk youth and have the ability to work with and coach youth in a criminal justice environment where detention rules and policies must be strictly followed. Instructors must the ability to perform a full range of specialized institution services designed for youth in juvenile detention facilities. Contractor must possess the skill-sets and capability to create a plan and execute a quality physical education, exercise, activity and recreation program that includes instructional strategies designed to respond to the different learning styles and abilities of the youth.
- 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. 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.
- Unlike the civil services recreational classes, this program will include structured and targeted exercise, therapeutic recreation, and a physical activity component administered by a professional who must understand physiology, muscle groups, and motor skills. This is important because the BSCC specifically requires at least one hour of "large muscle activity each day." This service would ensure compliance with regulatory mandates and the youth would benefit from working with trained professionals who are knowledgeable about physiology and requisite legal requirements. While ensuring compliance with applicable mandates, JPD would also be providing a structured physical education program where trauma-informed instructors could demonstrate the knowledge and skills to achieve and maintain a health-enhancing level of physical activity and fitness; promote discipline, self control, sportsmanship, teamwork; and teach the health benefits of physical activity through individual and group activities within a detention facility curriculum.
- 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 to adopt a new civil service class to perform this work, because it would likely involve the creation of multiple classifications that an experienced contractor has already acquired through years of education and hands-on training to develop physical and educational curricula and programs.

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 contract? If so, please explain what that will entail; if not, explain why not.
There is no training involved in the program services. The services are geared towards youth in detention facilities.
- 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. Provider is an incumbent and has had a PSC in the past.

7. Union Notification: On 12/18/20, 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: Nicholas Chavez Phone: 415-753-7627 Email: nicholas.chavez@sfgov.org

Address: 375 Woodside Ave., Room 202, San Francisco, CA 94127

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43740 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/01/2021

Receipt of Union Notification(s)

Chavez, Nicholas (JUV)

From: dhr-psccordinator@sfgov.org on behalf of nicholas.chavez@sfgov.org
Sent: Friday, December 18, 2020 5:12 PM
To: Chavez, Nicholas (JUV); Emanuel, Rachel (DEM); laborers261@gmail.com; Laxamana, Junko (BOS); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; 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 (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@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; ramonliuna261@gmail.com; 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; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@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 # 43740 - 17/18 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The JUVENILE PROBATION -- JUV has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1,

2020

– December 31, 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/12157>

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)



**San Francisco Juvenile Probation Department
375 Woodside Avenue
San Francisco, CA 94127**

December 16, 2020

To: Civil Service Commissioners
cc: Suzanne Choi

Re: PSC 43740 – 17/18 – Physical Education, Exercise & Recreation Program for Youth in Juvenile Detention Facilities

Please consider the Juvenile Probation Department's request to retroactively submit a modification for **PSC 43740 – 17/18**, which had an expiration date of June 30, 2020. This modification is to extend the term of the PSC up to December 31, 2021 so that it may coincide with the Department's contracts for physical education & recreational art programs for youth in the Juvenile Hall.

In the last year, the Juvenile Probation Department has experienced significant turnover on its Administration Team. We have been without a Contracts Manager and staff generally tasked with contracting responsibility were assigned to more urgent tasks. Now that our team has stabilized, we have greater bandwidth to manage our contracts. The Juvenile Probation Department operates a 24-hour/7-day a week residential facility for youth. These services are necessary because juvenile detention facilities are mandated by state and federal statutes and regulations, the State Education Code, the Board of State and Community Corrections Title 15, and the Welfare and Institutions Code to provide them. To comply, JPD must ensure that it has a diversified on-site physical education program and services that are available for youth ranging in age from 9 to 19, that can be administered within the structure of a juvenile detention facility. Without this service, the City will be unable to comply with the applicable regulations that govern the care and custody of youth who are wards of the Juvenile Court and under the supervision of the Juvenile Probation Department.

Please let me know if you require additional information to allow us to modify this contract retroactively.

Thank you for your consideration.

Sincerely,

Steve Arcelona
Deputy Director of Administration
Juvenile Probation Department
City & County of San Francisco
375 Woodside Avenue, Room 202
San Francisco, CA 94127
415-753-7817
steve.arcelona@sfgov.org

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: JUVENILE PROBATIONDept. Code: JUVType of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 43740 - 17/18)Type of Approval: ☐ Expedited ☒ Regular ☐ Annual ☐ Continuing ☐ (Omit Posting)Type of Service: Physical Education, Exercise & Recreation Program for Youth in Juvenile Detention FacilitiesFunding Source: Grant/General FundPSC Original Approved Amount: \$600,000PSC Original Approved Duration: 11/01/17 - 11/01/19 (2 years)PSC Mod#1 Amount: no amount addedPSC Mod#1 Duration: 11/06/18-06/30/20 (34 weeks 4 days)PSC Cumulative Amount Proposed: \$600,000PSC Cumulative Duration Proposed: 2 years 34 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Juvenile Probation Department (JPD) operates two 24-hour/7-day a week residential facilities for youth: Juvenile Hall and Log Cabin Ranch(located in La Honda CA). The Board of State & Community Corrections (BSCC) Title 15 minimum standards for juvenile facilities mandates physical education as a "required element" of the facility education program and on-grounds school. In order to comply with the State Education Code, applicable federal education statutes and regulations, JPD must ensure that it has a highly effective physical education program, in order to maximize the amount of time youth are out of their rooms and not confined to their beds. Per BSCC, Article 6, Programs and Activities, Section 1371, juvenile facilities must provide a daily supervised exercise, activity and recreation program, that includes "large muscle activity each day" as well as outdoor activity. The Welfare and Institutions Code (WIC), Division 2 requires that residential programs provide competency-based education services, training, and physical education, for wards of the Juvenile Court.

To comply with all statutes and regulations regarding youth who are confined to juvenile detention facilities, JPD is seeking a supplier to develop and implement a safe, compliant, comprehensive and structured physical education, exercise, activity, and recreation program that includes evidence-based instructional strategies to respond to youth with different learning styles and abilities.

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

This service is necessary because juvenile detention facilities are mandated by state and federal statutes and regulations, the State Education Code, the Board of State and Community Corrections, and the Welfare and Institutions Code to provide them. To comply, JPD must ensure that it has a diversified on-site physical education program and services that are available for youth ranging in age from 9 to 19, that can be administered within the structure of a juvenile detention facility. Without this service, the City will be unable to comply with the applicable regulations that govern

the care and custody of youth who are wards of the Juvenile Court and under the supervision of the Juvenile Probation Department.

- 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 43740 - 17/18

- D. Will the contract(s) be renewed?

Duration of the contract is expected to be 2 years (24 months) from the start of contract services, with an option to renew one time for 2 additional years (24 months). Therefore, if the option to extend is exercised by the City, the maximum term of the contract will be 4 years (48 months).

- 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:

Duration of the contract is expected to be 2 years (24 months) from the start of contract services, with an option to renew one time for 2 additional years (24 months). Therefore, if the option to extend is exercised by the City, the maximum term of the contract will be 4 years (48 months).

2. Reason(s) for the Request

- A. Display all that apply

☒ Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The Juvenile Probation Department (JPD) operates two 24-hour/7-day a week residential facilities for youth: Juvenile Hall and Log Cabin Ranch (located in La Honda CA). JPD reviewed City classes and did not find a classification that matches the requisite skill-sets and abilities to perform the full range of services that are needed. The contractor must be available to come on-site at the 2 detention facilities: The services needed by JPD require a level of expertise that would include knowledge, skills, and experience in developing and administering a structured physical education curriculum/program for the 2 on-grounds schools that must comply with the State Education Code, the County Board of Education policies, the Board of State and Community Corrections Title 15 minimum standards for juvenile facilities, all applicable federal education statutes and regulations. To comply with statutes and regulations regarding youth who are confined to juvenile detention facilities, JPD is seeking a contractor to develop and implement a safe, compliant, comprehensive and structured physical education, exercise, activity, and recreational program that includes evidence-based instructional strategies to respond to youth with different learning styles and abilities.

- B. Reason for the request for modification:

To extend the term of the PSC. There was a delay in contract start dates, impacting end dates. PSC term was for 2 years and contract terms do not align with PSC terms. This modification will extend the contract term dates.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Instructors must be able to pass a specialized security and criminal background check clearance. Required skills and expertise include education, training and experience in creating effective and literate gender-specific and co-ed physical education programs. Services must be administered by skillful instructors who are trained and proficient in isometrics, calisthenics, aerobics, conditioning, and sports for both girls and boys. Instructors must be knowledgeable about trauma-informed issues that impact at-risk youth and have the ability to work with and coach youth in a criminal justice environment where detention rules and policies must be strictly followed. Instructors must the ability to perform a full range of specialized institution services designed for youth in juvenile detention facilities. Contractor must possess the skill-sets and capability to create a plan and execute a quality physical education, exercise, activity and recreation program that includes instructional strategies designed to respond to the different learning styles and abilities of the youth.
- 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. If applicable, what efforts has the department made to obtain these services through available resources within the City?

Not Applicable

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- A. Explain why civil service classes are not applicable.
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- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
There is no training involved in the program services. The services are geared towards youth in detention facilities.
- C. Are there legal mandates requiring the use of contractual services?
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- 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. Provider is an incumbent and has had a PSC in the past.

7. Union Notification: On 11/06/18, 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: Phone: 415-753-7560 Email: Elena.Baranoff@sfgov.org

Address: 375 Woodside Ave., Room 202, San Francisco, CA 94127

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43740 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 11/27/2018