



London Breed
Mayor

Carol Isen
Human Resources Director

Date: June 4, 2021

To: The Honorable Civil Service Commission

Through: Carol Isen
Human Resources Director

From: Cynthia Avakian, AIR
Jenny Collins, ECN
Amy Nuque, MTA
Marcus Lange, LIB
Shawndrea Hale/ Daniel Kwon, PUC
Jacquie Hale, DPH

Subject: **Personal Services Contracts Approval Request**

This report contains nine (9) 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
\$16,869,000	\$205,198,816	\$1,809,031,166

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POSTING FOR

June 21, 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
47961 - 20/21	AIRPORT COMMISSION	\$11,000,000.00	Contractor will provide and manage customer services at all public screening checkpoints at the San Francisco International Airport (SFO or Airport). Contractor will provide staff at checkpoints to greet guests, perform document verification, scan boarding passes, and provide access to screening areas for the flying public and other authorized personnel. Contractor will also be responsible for managing the layout of the queue areas at checkpoints for efficiency and will enforce the Airport's safety and health requirements. Contractor may also design and deliver an Airport Security Checkpoint Guest Services Training Program for their employees and perform surveying and market research services including: designing of questionnaires, conducting in-person interviews, and providing analysis and reports.	July 1, 2021	December 31, 2028	REGULAR
40389 - 20/21	ECONOMIC AND WORKFORCE DEVELOPMENT	\$200,000.00	The Office of Economic and Workforce Development (OEWD) is seeking to update and expand on the 2012 impact analysis to determine the impact of Community Benefit Districts (CBD) and Business Improvement Districts (BID) in the City and County of San Francisco. Contractor will work with OEWD, the CBD/BIDs, other City departments (as necessary), and other outside stakeholders to develop a framework for a study to determine what impact the CBD/BID program has had on the City as a whole and its efficacy. Contractor will develop a study framework/methodology, implementation plan, and deliver a final report to OEWD.	July 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
41937 - 20/21	MUNICIPAL TRANSPORTATION AGENCY	\$750,000.00	<p>Institute for the Future (ITFF) will partner with SFMTA on implementing a Federal Transit Administration (FTA)-funded grant project, National Transit Adaptation Strategy. Institute for the Future will develop a focused strategy to help identify mobility needs, target market segments, and develop messaging to rebuild confidence in public transportation to quickly drive up ridership that has been affected by the pandemic.</p> <p>ITFF's specific work will include developing a futures report that evaluates a 10-year forecast for the public transportation industry in the United States. ITFF will identify candidate areas for potential exploration and narrow the focus to large-scale directions of change that are likely to reshape the broad operating environment in the coming decade for transit. ITFF will also work on developing specific customer profiles and personas of public transportation users. This process will lead to the development of specific messaging for target audiences that can be used in print and digital form, with the objective of building public confidence and loyalty in using transit.</p>	May 1, 2021	May 1, 2023	REGULAR
40805 - 20/21	PUBLIC LIBRARY	\$1,000,000.00	<p>SFPL seeks a Contractor to develop a five-year strategic plan (Plan). The Contractor shall work with SFPL leadership, staff, and stakeholders to structure, draft, revise, and present a Plan informed by data and best practices and designed to inform collections, programming, services, and capital decisions for SFPL.</p> <p>SFPL expects the development of the Plan would involve, at a minimum:</p> <p>A. Outreach, communications, and engagement to hear the perspectives of SFPL leadership, staff, and internal/external stakeholders (communications plan, outreach and engagement strategy, mission and values audit, interviews/focus groups/workshops, written summaries of each engagement, surveys)</p> <p>B. Qualitative and quantitative analysis (review of past efforts and existing documents, demographic analysis, best practice review, analysis of emerging resilience needs)</p> <p>C. Strategic Plan documents (mission statement and core values with racial equity framework, goals, objectives, long-term strategies, continuous improvement toolkit, graphics, documentation of process and work)</p> <p>D. Consistent, efficient project management (kick-off, work plan, regular meetings)</p> <p>E. Presentation support (materials development, content delivery)</p>	July 1, 2021	June 30, 2025	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			Please note that our scope of work does NOT include any legal work.			
43923 - 20/21	PUBLIC UTILITIES COMMISSION	\$500,000.00	<p>Contractor will be required to assist the SFPUC with the application of the sodium carbonate peroxyhydrate and hydrogen dioxide in local source water reservoirs, including but not limited to Calaveras, San Antonio Reservoir, Crystal Springs, Pilarcitos and San Andreas Reservoirs.</p> <p>The Contractor is expected to provide all labor, technical advice, written pest control recommendations, watercraft, precision application inductor systems and GPS tracking equipment for the specified reservoir treatment at the application rate as specified by the SFPUC. The Contractor shall document the aquatic algaecide treatment through the use of GPS data collection equipment to record the path of the treatment boats across the treatment areas within the specified reservoir. Treatments, once started, shall be fully completed prior to the Contractor demobilizing from the site and shall be performed on a 24-hour per day, 7-day per week basis. In addition to the actual algaecide application, the services that shall accompany each treatment are as follows:</p> <p>All work performed by Contractor must conform to and comply with the requirements of all applicable permits, licenses and environmental mitigation requirements developed under the California Environmental Quality Act.</p> <p>A pre-treatment inspection shall be conducted by the Consultant, which shall include a survey of the reservoir to be treated to ensure an accurate assessment of the treatment area conditions. A post-treatment report shall be prepared by the Consultant and submitted to the SFPUC presenting a summary of the treatment within 15 working days following each treatment. This report shall contain a written description of the work performed, a listing of the licensed applicators and other staff who performed the work, equipment used and the treatment methodology.</p> <p>The post-treatment report shall also contain the GPS treatment data, in digital format, collected during the treatment. The treatment area shall be downloaded into ArcView 9.1 software and overlaid onto an existing</p>	July 1, 2021	June 30, 2026	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>aerial photo of the specified reservoir for documentation and regulatory reporting requirements.</p> <p>The SFPUC will provide the following: The required amount of algaecide, any water discharge permit modifications and notifications required for application and any surface water quality monitoring associated with the algaecide application that may be required by water discharge permits, if any.</p>			
45411 - 20/21	PUBLIC UTILITIES COMMISSION	\$300,000.00	<p>There are two main components of proposed work: third-party verification of SFPUC's green bonds and development of SFPUC's green bond program. Third party verification must come from a verifier who has been approved by the Climate Bonds Initiative. The verifier requests data from before and after bonds are issued, reviews the data and issues verification reports that confirm that projects funded by green bonds are eligible for green bond certification. This process goes on throughout the entire duration of outstanding bond debt, up to 30 years. Development of the green bond program includes activities that support the rapid growth of the green bonds market, consistent with global best practices. Aligned activities include, but is not limited to, publishing an annual green bond report directly onto SFPUC's investor relations page, implementing strategies to broaden SFPUC's investor base by attracting climate-aligned investors, and improving systems and protocols to streamline the green bond certification and reporting process both internal at the SFPUC and externally amongst the family of San Francisco agencies. For example, SFPUC has historically contracted with a consultant to support the publication of this annual report and these funds would be used to continue that work as well as make that support available to other city agencies who wish to pursue green bonds. Additionally, the SFPUC is initiating a pilot program to develop a Climate Aligned Capital Planning methodology and would use these funds to get support from Universities and other consultants. Each contract would follow standard contracting protocols.</p>	June 6, 2021	June 5, 2026	REGULAR
46189 - 20/21	PUBLIC UTILITIES COMMISSION	\$900,000.00	<p>PSC 46091 - 19/20 was approved by the Civil Service Commission on May 18, 2020 for the scope of work in this request. PSC 46091 - 19/20 will expire on May 18, 2021, before the expected execution of SFPUC Contract PRO-0156. This request will allow the SFPUC to complete the execution of Contract PRO.0156.</p>	October 1, 2021	September 30, 2026	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>Fish screen cleaning and Division of Safety of Dams-required valve exercising at raw water supplies including: San Antonio Reservoir, Calaveras Reservoir, Crystal Springs Reservoir, and San Andreas Reservoir.</p> <p>Perform required treated water tanks and reservoir inspections and cleanings as required. Tanks and reservoirs to be inspected and cleaned are: Castlewood Reservoir, Tesla Treatment Facility domestic water tanks, Sunol Town Tanks, SVWTP Chlorine Contact Tank, SVWTP Treated Water Reservoir, The Balancing Reservoir, HTWTP Chlorine Contact Chamber, and HTWTP Treated Water Reservoir.</p>			
31866 - 20/21	PUBLIC HEALTH	\$2,000,000.00	Services are for on-site collection, consolidation, sorting and compacting of trash and recycling at Zuckerberg San Francisco General Hospital (ZSFGH).	July 1, 2021	June 30, 2023	REGULAR

TOTAL AMOUNT \$16,650,000

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

Posting For June 21, 2021

Proposed Modifications to Personal Services Contracts

Commission Hearing Date

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
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Library seeks a bindery contractor to machine bind and rebind of books, periodicals, pamphlets, reports, newspapers, music scores and other materials not otherwise classified. Contractor's work must meet the specifications of the ANSI/NISO/LBI Library Binding Standard, 2000 and Guide to the ANSI/NISO/LBI Library Binding Standard 2008 (or most recent edition); as well as the Library's Binding Specifications. The company is

30481 - 19/20 - MODIFICATIONS	June 21, 2021	PUBLIC LIBRARY -- LIB	\$219,000	\$300,000	also responsible for setting up a database of the required binding information for periodicals using the current Contractor's "rub information" which the Library will supply. This work must be done within 30 days of receipt of the binding information provided by the Library. There will be approximately 1,500 titles. They will also provide boxes for shipping of material and address labels for each carton at no extra cost. Pick-up and delivery of materials will be according to the schedule decided by San Francisco Public Library.	03/18/2021	12/31/2024	REGULAR
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TOTAL AMOUNT \$219,000

**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: Airport Security Checkpoint Customer Services

Funding Source: Airport Operating Funds

PSC Amount: \$11,000,000

PSC Est. Start Date: 07/01/2021

PSC Est. End Date 12/31/2028

1. Description of Work

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

Contractor will provide and manage customer services at all public screening checkpoints at the San Francisco International Airport (SFO or Airport). Contractor will provide staff at checkpoints to greet guests, perform document verification, scan boarding passes, and provide access to screening areas for the flying public and other authorized personnel. Contractor will also be responsible for managing the layout of the queue areas at checkpoints for efficiency and will enforce the Airport's safety and health requirements. Contractor may also design and deliver an Airport Security Checkpoint Guest Services Training Program for their employees and perform surveying and market research services including: designing of questionnaires, conducting in-person interviews, and providing analysis and reports.

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

The Airport has a need for services that facilitate safe, courteous, and efficient access to security screening checkpoints and connecting flights. Historically, the airlines provided contracted personnel to perform this work. Due to the COVID-19 pandemic, those airlines have reduced staff or eliminated these services altogether resulting in severely reduced service levels at the expense of the Airport's reputation rather than the carriers. If denied, the Airport may suffer reputational damage, a reduction in passenger satisfaction, and potential loss of revenues.

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 historically been provided by airline contractors.

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.

This PSC is requested for a term of seven years including options, to match the contract that the Airport seeks to enter into.

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:

Due to the financial impact and uncertainty that the Airport and City are currently experiencing as a result of the COVID-19 pandemic, the establishment of new civil service positions and transitioning the work back to the City is not practical. Additionally, the demand for services will change based on the frequent fluctuation of flight activity.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Contractor must be knowledgeable of Airport and Transportation Security Administration (TSA) rules and regulations, procedures and policies and the application of rules regarding permissible persons and documentation for checkpoint access in an airport environment. The Contractor is required to have a high level of knowledge and expertise in conducting in-person interviews and mail-back surveys; designing

questionnaires; sampling design; conducting statistical analyses; interviewing in English, Spanish, and multiple other languages as required by the Airport; and furnishing computerized survey data results.

B. Which, if any, civil service class(es) normally perform(s) this work? 1324, Customer Service Agent; 1326, Customer Service Agent Supv; 0922, Manager I;

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 currently no civil service classes that can perform the entire scope of the work specific to the Airport's needs and no available resources that can meet the fluctuating demand 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.

The 1324 Customer Service Agent and 1326 Customer Service Agent Supervisor classifications may be able to perform some of the customer support functions of this work, however these existing classes receive and process telephone calls from the general public specifically through the 311 Call Center. The Airport Security Customer Service Agents will directly work at the Airport and must be knowledgeable of Airport and TSA rules and regulations, procedures and policies and the application of rules regarding permissible persons and documentation for checkpoint access in an airport environment. Knowledge and expertise in conducting in-person interview in English, Spanish, and multiple other languages as required by the Airports; designing questionnaires; sampling design; conducting statistical analyses; and furnishing computerized survey data results are also 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, it would not be practical to adopt a new civil service class for this specialized work, for which demand may not be consistent.

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. There will be no training provided as part of these services, as there are no available resources at the City to perform this 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 03/02/2021, the Department notified the following employee organizations of this PSC/RFP request:

Municipal Executive Association; 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: 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# 47961 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhrr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfso.com
To: [Cynthia Avakian \(AIR\)](#); [Meyers, Julie \(HSA\)](#); Ricardo.lopez@sfgov.org; [Basconcillo, Katherine \(PUC\)](#); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; [Poon, Sin Yee \(HSA\)](#); david.canham@seiu1021.org; jtanner940@aol.com; [Laxamana, Junko \(BOS\)](#); Criss@sfmea.com; camaguey@sfmea.com (contact); Christina@sfmea.com; staff@sfmea.com; [Janelle Dung-Sapantay \(AIR\)](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 47961 - 20/21
Date: Tuesday, March 2, 2021 5:38:08 PM

RECEIPT for Union Notification for PSC 47961 - 20/21 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 47961 - 20/21 for \$11,000,000 for Initial Request services for the period 07/01/2021 – 12/31/2028. 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:

<http://apps.sfgov.org/dhrdrupal/node/15979> 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: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN

Dept. Code: ECN

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

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

Type of Service: Consulting - CBD/BID Impact Analysis

Funding Source: General Fund

PSC Duration: 1 year 52 weeks

PSC Amount: \$200,000

1. Description of Work

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

The Office of Economic and Workforce Development (OEWD) is seeking to update and expand on the 2012 impact analysis to determine the impact of Community Benefit Districts (CBD) and Business Improvement Districts (BID) in the City and County of San Francisco. Contractor will work with OEWD, the CBD/BIDs, other City departments (as necessary), and other outside stakeholders to develop a framework for a study to determine what impact the CBD/BID program has had on the City as a whole and its efficacy. Contractor will develop a study framework/methodology, implementation plan, and deliver a final report to OEWD.

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

The CBD/BID program has grown exponentially over the last 5 years in response to a variety of factors. This study would aim to determine and educate people and groups on whether these entities do, in fact, address the issues they believe so. Members of the Board of Supervisors have requested an update to the FY 2011-2012 impact analysis so they have a better understanding of the program and its current impacts. Contracting is necessary as the scope and methodology is too large for OEWD staff to handle individually. Also, having a third party work on this with OEWD has the added benefit of maintaining impartiality as the CBD/BIDs work very closely with CCSF partners.

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 only done once in the past during FY 2011-2012. This was done via working with outside groups, in that case graduate students at UC Berkeley.

D. Will the contract(s) be renewed?

No, this is a one-time project.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.
not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The wide variety of skills to complete the project does not line up with any one PSC class; additionally, the CBD program does not have the staff capacity to handle a project of this magnitude. This is also a one-time, short term project.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Research, data analysis, literature review, experience with CBD/BIDs, neighborhood economic development, data review, understanding of best CBD/BID practices, interview skills, document production, and reporting.

B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will use data software and algorithms that the City does not possess. This will be used to help draw inferences and conclusions. They will also have access to literature that we do not currently have access to for review.

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

If we were to do this internally, OEWD would need to hire more staff to support the CBD program. Currently OEWD has 1 FTE operating as the Program Director. There is a 9772 position that has been vacant since October 2019 that we anticipate will be filled before the end of the FY. Unfortunately, a 9772 does not have the skill set necessary to lead such a robust study. In 2015 the CBD program had 2.5 FTE City staff working on it. Since then it has usually been staffed by 1 individual and has seen significant growth over the years. As of right now there is no capacity for internal staff to handle this and there would need to be a significant hiring uptake to have such capacity. Additionally, hired staff would have to have a wide variety of skills across various areas, it does not appear that any one classification would meet this outright.

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

- A. Explain why civil service classes are not applicable.
The wide variety of skills to complete the project does not line up with any one PSC class; additionally, the CBD program does not have the staff capacity to handle a project of this magnitude. This is also a one-time, short term project.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this project is short term and requires specific skills.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. No training as this is a onetime, short term 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 04/26/2021, the Department notified the following employee organizations of this PSC/RFP request:

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

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40389 - 20/21

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 06/21/2021

Civil Service Commission Action:

Receipt of Union Notification(s)

Receipt of Notice for new PCS over \$100K PSC # 40389 - 20/21

dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org>

on behalf of

Jenny.Collins@sfgov.org <jenny.collins@sfgov.org>

Mon 4/26/2021 11:06 AM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (BOS) <junko.laxamana@sfgov.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; pkim@ifpte21.org <pkim@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; Collins, Jenny (ECN) <jenny.collins@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

RECEIPT for Union Notification for PSC 40389 - 20/21 more than \$100k

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a request for a Personal Services Contract (PSC) 40389 - 20/21 for \$200,000 for Initial Request services for the period 07/01/2021 – 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/16388> 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 (RFP) #215

Economic Development and Business Development Grants

Issued by:	Office of Economic and Workforce Development (OEWD)
Date issued:	Monday, December 14, 2020 <i>This revision issued December 23, 2020</i>
Proposals due:	Tuesday, January 12, 2021 by 5:00 P.M. Only Online Submissions will be accepted in accordance with public health and accessibility guidelines.
Questions about this RFP?	Submit questions via: https://oewdprocurement.tfaforms.net/f/RFP215questions Email: oewd.procurement@sfgov.org
<p>OEWD will host an optional Bidders Conference to assist applicants in determining the eligibility of proposed projects, completing the proposal package, and navigating City requirements on:</p> <p style="text-align: center;">DATE: Friday, December 18, 2020 TIME: 3:30 P.M. - 5:00 P.M.</p> <p style="text-align: center;">Please register for the Bidders Conference using the following Zoom meeting Link: https://zoom.us/meeting/register/tJYvf-moqjgoG9Hcsb8P5Cs_TvGmJtvOjZln</p> <p style="text-align: center;">This event will be conducted remotely, in accordance with public health and accessibility guidelines. The event will include captioning. If you need language translation services to participate in this meeting, please email oewd.procurement@sfgov.org three (3) days prior to the event. A recording of the meeting and all presentation materials will be posted to the OEWD website following the event at: www.oewd.org/bid-opportunities/RFP-215</p>	
<p>Need the RFP or application materials in alternative formats for persons with disabilities? Please email oewd.procurement@sfgov.org</p>	

Request for Proposals (RFP) #215

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- B. Proposal Budget Template
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- D. Applicant Requirements and Guidelines
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I. Introduction, Overview and Schedule

COVID-19 has had a profound impact on our local and global economy. Since the onset of the public health crisis in San Francisco in March, tens of thousands of local jobs have been lost and countless businesses closed, many permanently. Every corner of society and the economy has been impacted, though not all evenly.

COVID-19 has had a disproportionate impact on certain sectors of the economy and segments of the population. Lower-wage industries as well as those that rely on commuters and tourists including food service, hospitality, arts, entertainment, and recreation, have sustained the heaviest losses. Low-income communities and communities of color have also suffered far greater infections, hospitalizations, and deaths from the virus.

These twin economic and health crises have put economic vulnerabilities and disparities in sharp relief, a reality that has been further underscored by the surging demand for racial justice ignited by the murder of George Floyd and other people of color by police.

In response to these momentous events, the Office of Economic and Workforce Development (OEWD) immediately shifted resources, leveraging public and private funds, to meet the urgent needs of San Francisco's workers, businesses, civic and non-profit organizations, and vulnerable populations arising from the pandemic. OEWD is committed to doing everything we can to achieve a racially just and equitable economy as we work to sustain and revive local businesses and employment, mitigate the economic hardship affecting our most vulnerable, and rebuild our economy. As relief efforts move forward into 2021, with the City's first distribution of the COVID-19 vaccine going to our frontline healthcare workers beginning this month, our investments to advance recovery must continue.

The funding in this Request for Proposals (RFP) responds to the recovery needs of OEWD's many stakeholders including the small business community, neighborhoods, non-profit partners, elected leaders as well as the recommendations of the COVID-19 Economic Task Force. The RFP maintains long-standing, successful programs and partnerships while focusing on program areas that support recovery, including targeted investments in: clean and safe outdoor and public spaces; hard hit neighborhoods, commercial corridors and business sectors; technical, real estate and legal support for small businesses; and resources to support marketing and customer attraction.

The twenty-nine (29) distinct economic development programs in this RFP encompass Commercial District Activation and Neighborhood Vitality, Small Business Real Estate Support and Access to Capital, and Business Sector Support and Enhancement. The total amount of funding available for initial grant and contract awards is **\$3,850,000**.

Throughout the RFP, we ask our partners to consider and submit proposals that appropriately adapt their services and activities to a current and future reality defined by COVID-19. We look forward to receiving your proposals, as our partnership with you and your organizations will strengthen our collective efforts in realizing an equitable recovery for San Francisco's diverse communities.

About Invest in Neighborhoods (IIN)

The vision of the Invest in Neighborhoods (IIN) Division is to advance racial equity, diversity and inclusion in San Francisco's neighborhood commercial corridors so they are economically thriving, safe, resilient, sustainable, and meet the needs of local residents and users. In alignment with this vision, IIN's objectives are to strengthen small businesses, improve physical conditions, increase quality of life, and build community capacity.

In pursuit of these objectives, IIN offers programs that are designed to provide focused, customized assistance that meets the specific needs of San Francisco's neighborhood commercial corridors by leveraging existing programs from across multiple City departments and nonprofit partners. There are many programs offered through IIN for which more information can be found at <https://oewd.org/neighborhoods>

About Business Development

San Francisco has long been a beacon to people and companies who think outside the box. As a result, the City has become an international hub for a number of pioneering, forward-thinking industries including in life sciences, information technology, clean technology, manufacturing, fashion, nightlife, and international commerce.

Dedicated to continuing San Francisco's tradition of business excellence, OEWD's Business Development team provides specialized support to address the unique needs of businesses in a variety of key sectors. For emerging and established companies alike, our team serves as a centralized clearinghouse of information and services to support these industries' ongoing success.

Technical Assistance

OEWD is committed to ensuring all applicants have a fair chance to compete for this funding. In recognition of the current public health climate, all technical assistance will be provided online/by phone. While not required, we encourage applicants to attend the Bidders Conference on **December 18, 2020 from 3:30PM to 5:00PM** to get questions answered about each program area. If you are applying for the first time, we especially encourage you to attend the Bidders Conference for more detailed information on the process to becoming an eligible City Supplier (vendor), as well as to ask questions about OEWD's strategies and objectives. If

you have any questions about this RFP, or need assistance with the application, please get in touch with our office at the following email address: owd.procurement@sfgov.org

A. Eligible Applicants

You are eligible to apply if you:

- Are a nonprofit organization, registered with the Internal Revenue Service and in good standing with the State of California’s Registry of Charitable Trusts.
 - For some service areas, proposals will **also** be considered from for-profit corporations and/or individual sole proprietors. Please review the Program Area Table on pages 9-10 of the RFP to confirm which service areas are open to for-profit applicants;
 - For some service areas, proposals will **only** be considered from existing Community Benefit Districts (CBDs) and Business Improvement Districts (BIDs) Please review the Program Area Table on pages 9-10 of the RFP to confirm which service areas are limited to CBDs and BIDs.
- Are not debarred or suspended from participation in local, State or Federal programs;
- Meet all minimum qualifications within the specific program area(s) you are interested in;
- Can comply with all local, state or federal laws and regulations if funded. Please see **Appendix C** and **Appendix D** for more information about general terms and conditions of City funding opportunities.

B. Available Funding

The initial round of funding is expected to come from the local City funds (“General Fund”). OEWD may also award a variety of federal, state or local funding including, but not limited to:

- Department of Labor - Workforce Innovation and Opportunity Act (WIOA), American Apprenticeship Grant, Emergency Funds, etc.
- US Small Business Association (SBA)
- Housing and Urban Development - Community Development Block Grant (CDBG)
- Other city, state, federal and non-government sources, such as contributions from private foundations

The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability. Actual awards will be determined by the number of responsive proposals that meet OEWD strategies and objectives, and funding may be less or more. Please submit budget requests according to the limits in this RFP, however, OEWD may negotiate different funding allocations and project goals before finalizing awards. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount.

This RFP, and the proposals received as a result of it, may be used to justify funding decisions for other similar services and/or other funding that becomes available through OEWD or any other City department. OEWD, or other City agencies, will disclose any additional regulations or requirements during the negotiation process for grants or contracts that are awarded through this RFP and funded by other local, state, federal or non-city sources.

Nonprofit organizations funded by OEWD under this RFP may also be eligible to apply for funding under OEWD's nonprofit capacity fund. The goal of OEWD's nonprofit capacity fund is to maintain continuity of economic and workforce development services by potentially assisting OEWD's nonprofit suppliers with one-time, as-needed funds to support administrative operations and organizational effectiveness (e.g. leadership transition, strategic partnership). The fund is dependent on funding availability, and limited to nonprofit organizations who are currently funded by OEWD for the specific purpose of providing economic and workforce development services. When funding becomes available, eligible nonprofit organizations currently funded by OEWD will be notified of the opportunity to apply for funding.

C. Service Period

Unless otherwise noted in the program descriptions, successful proposals will be funded for a term of one **(1) year**, beginning in fiscal year 2020-2021. In some cases, the City may renew or extend programming through fiscal year 2024-2025. All decisions regarding the size, length, and scope of future funding awards are subject to OEWD approval and budget availability. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the grantee during the initial award period, as well as other policy considerations as determined by OEWD. Grantees will be asked at a minimum to submit a final report of their activities and, if OEWD elects to renew the award, a revised scope of work and budget for the renewal period(s) for OEWD review. OEWD reserves the right, in its sole discretion, to not renew funding awards.

D. Schedule

The anticipated schedule for awarding initial funding is as follows:

Proposal Phase	Date
RFP is issued by the City	Monday, December 14, 2020 <i>This revision issued December 18, 2020</i>
Bidders Conference	Friday, December 18, 2020 3:30 P.M. – 5:00 P.M. The Bidders Conference will be held online as a Zoom meeting. Registration is required. You may register for the Bidders Conference by clicking this link: <u>RFP 215 Bidders Conference – December 18</u>
Deadline for submission of written questions*	Tuesday, December 22, 2020 at 5:00 P.M. Monday, December 28, 2020 at 5:00 P.M.
Answers to questions posted online	1 st posting: Thursday, December 24, 2020 by end of day Final posting: Wednesday, December 30, 2020 by end of day
Proposals due	Tuesday, January 12, 2021 by 5:00 P.M.
Committee Review	Mid-January 2021-mid February 2021
Grantee Selection and award notification	Anticipated February 19, 2021
Protest period ends	5 business days after award notification
Projects begin	Most projects anticipated to start April 2021 or later

Each date is subject to change. For the latest schedule, check: <http://oewd.org/bid-opportunities/RFP-215>

*Note: General administrative and specific program area questions should be submitted here: <https://oewdprocurement.tfaforms.net/f/RFP215questions>. Purely technical questions regarding how to find or navigate the RFP, appendices or online application will be answered until the proposal submission deadline. Send an email to oewd.procurement@sfgov.org if you have technical assistance needs.

II. Program Areas and Scope of Work

This RFP includes **twenty-nine (29)** distinct economic development programs.

Press "Ctrl" and click the hyperlink (Program Area Name) to navigate to a specific program.

#	Program Area Name	Maximum Budget Request per Proposal	Anticipated Number of Awards	Eligible Applicants	Page #
A	Chinatown Halloween and Springtime Festivals	\$50,000	1	Nonprofits	11
B	Chinatown Music and Dance Festivals	\$45,000	1	Nonprofits	13
C	Chinatown Customer Attraction and Marketing Project	\$25,000	1	Nonprofits	15
D	Greater Chinatown Corridor Manager	\$100,000	1	Nonprofits	17
E	Chinatown Open Space Activation	\$25,000	2	Nonprofits	19
F	Chinatown Quality of Life Improvement Projects	\$15,000	2	Nonprofits	21
G	Chinatown Business Strengthening Projects	\$25,000	2	Nonprofits	23
H	Excelsior Small Business Support & Neighborhood Improvement Projects	\$75,000	Up to 3	Nonprofits	25
I	Lower Fillmore Small Business Technical Assistance and Neighborhood Support	\$75,000	1	Nonprofits	28
J	Lower Fillmore Corridor Support	\$30,000	1	Nonprofits	30
K	Art Programming and Training for African American Youth	\$20,000	1	Nonprofits	32
L	Calle 24 Latino Cultural District Economic Vitality	\$100,000	1	Nonprofits	34
M	North Beach Street Conditions Program and Activation	\$15,000	1	Nonprofits	37
N	Leland Avenue Visitacion Valley Greenway Project	\$25,000	1	Nonprofits	39
O	SF Shines Window Display	\$25,000	Up to 5	Nonprofits, For-profits	41

#	Program Area Name	Maximum Budget Request per Proposal	Anticipated Number of Awards	Eligible Applicants	Page #
P	<u>SF Shines Storefront Improvement</u>	\$250,000	Up to 3	Nonprofits	43
Q	<u>Community Benefit District/Business Improvement District Organizational Support</u>	\$20,000	4	Existing CBDs and BIDs	45
R	<u>Community Benefit District/Business Improvement District Impact Analysis</u>	\$200,000	1	Nonprofits, For-profits	47
S	<u>Commercial Loans – Revolving Loan Fund</u>	\$575,000	1	Nonprofits	50
T	<u>Public Space Improvement Services</u>	\$250,000	Up to 6	Nonprofits	54
U	<u>Real Estate Case Management Services</u>	\$200,000	1-2	Nonprofits, For-profits	56
V	<u>Small Business and Commercial Property Owner Legal Support Services</u>	\$50,000	1	Nonprofits	58
W	<u>Business Development and Technical Assistance Grant for Black Transgender and Gender Nonconforming Small Businesses and Entrepreneurs</u>	\$250,000	1-2	Nonprofits	60
X	<u>Accelerate Manufacturing</u>	\$90,000	1	Nonprofits	62
Y	<u>Distribution and Repair Business Development</u>	\$45,000	1	Nonprofits	65
Z	<u>FashionSF</u>	\$30,000	Up to 3	Nonprofits	67
AA	<u>SF Biz Connect</u>	\$60,000	1	Nonprofits	70
BB	<u>Shop & Dine in the 49</u>	\$30,000	1	Nonprofits	72
CC	<u>Human Centered Design/Innovation: Organizational Development Projects for Youth, Education, and Opportunity</u>	\$50,000	1-2	Nonprofits, For-profits	74
DD	<u>Human Centered Design/Innovation: Organizational Development Projects for Strategy + Planning</u>	\$100,000	1-2	Nonprofits, For-profits	77
EE	<u>Human Centered Design/Innovation: Organizational Development Projects for Internal Training + Integration</u>	\$50,000	1-2	Nonprofits, For-profits	80

Program Area A: Chinatown Halloween and Springtime Festivals

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$50,000. Applicants may propose budgets up to **\$50,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown residents, businesses, and community stakeholders

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to organize and facilitate two (2) cultural events that enhance and support the businesses in the Chinatown commercial corridor through community collaboration, business networking, and cultural preservation.

Activities may include, but are not limited to, the following:

- Coordinate and facilitate two (2) cultural events – Halloween and Springtime Festivals to promote the Chinatown Neighborhood
- Develop culturally-appropriate strategies that attract and encourage participants/visitors to better appreciate Chinatown’s cultural and historical assets
- Develop promotional materials, media/marketing opportunities, and merchant/partnership guides to promote local spending
- Obtain required permits and comply with all City regulations for public events
- Assist local merchants in preparation and involvement in project activities, e.g. joint effort to promote events, decorate storefronts, provide discounts and contributions
- Engage in neighborhood collaboration to establish year-round event schedule and strengthen community partnership

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide eight (8) reports on each objective to the City’s Team on/before the report due dates.

- Planning & Coordination Report;
- Outreach & Promotion Report;
- Business Attraction & Assistance Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- At least 3 years history, experience, and success providing cultural and/or community events in Chinatown neighborhood
- At least 3 years history of administering city-funded economic development and/or cultural appreciation projects
- Established relationships with local merchant associations, family associations and community-based organizations
- At least 3 years experience and success in organizing and facilitating public events through the organization's resources and community/commercial partnership
- Success in recruiting and assisting local businesses to contribute towards and participate in the events
- High level of experience in effective communication and reporting skills for staff assigned to the project
- Familiarity with OEWD, Invest in Neighborhoods (IIN) Initiative, IIN Programs, and how your organization's mission fits into the goals and objectives of OEWD and IIN

Preferred Qualifications:

- Beyond simply providing cultural events, preference will be given to applicants with at least three (3) years of experience planning, coordinating, and hosting Chinatown cultural events which incorporate local businesses and the broader community.

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area B: Chinatown Music and Dance Festivals

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$45,000. Applicants may propose budgets up to **\$45,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown residents, businesses, and community stakeholders

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to organize and facilitate two (2) musical events in Chinatown through community collaboration, business networking, and cultural preservation.

Activities may include, but are not limited to, the following:

- Coordinate and facilitate two (2) musical events – Music and Dance Festivals -- to promote Chinatown Neighborhood
- Develop culturally-appropriate strategies that attract and encourage participants/visitors to better appreciate Chinatown’s cultural and historical assets
- Develop promotional materials, media/marketing opportunities, and merchant/partnership guides to promote local spending
- Obtain required permits and comply with all City regulations for public event
- Assist local merchants with preparation and involvement in project activities, e.g. joint - effort to promote events, decorate storefronts, provide discounts and contributions
- Engage in neighborhood collaboration to establish year-round event schedule and strengthen community partnership

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide eight (8) reports on each objective to the City’s Team on/before the report due dates.

- Planning & Coordination Report;
- Outreach & Promotion Report;
- Business Attraction & Assistance Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco.
- At least 3 years history, experience, and success providing cultural and/or community events in Chinatown neighborhood
- At least 3 years history of administering city-funded economic development and/or cultural appreciation projects
- Established relationships with local merchant associations, family associations and community-based organizations
- At least 3 years experience and success in organizing and facilitating public events through the organization's resources and community/commercial partnerships
- Success in recruiting and assisting local businesses to contribute towards and participate in the events
- High level of experience with effective communication and reporting skills for staff assigned to the project
- Knowledge of OEWD, Invest in Neighborhoods (IIN) Initiative, IIN Programs, and how your organization's mission fits into the goals and objectives of OEWD and IIN

Preferred Qualifications:

- Beyond simply providing cultural events, preference will be given to applicants with at least three (3) years of experience planning, coordinating, and hosting culturally-relevant Chinatown festivals.

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area C: Chinatown Customer Attraction and Marketing Project

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$25,000. Applicants may propose budgets up to **\$25,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown commercial corridor businesses

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to partner with OEWD to enhance and support the businesses in the Chinatown commercial corridor through business and community networking, district-wide marketing, corridor-image improvement, customer-attracting accommodations and nightlife business development.

Activities may include, but are not limited to, the following:

- Develop and implement a district marketing campaign to promote neighborhood-serving business and to increase customer visit and spending
- Showcase Chinatown business characteristics through artwork exhibitions, social network and mainstream media
- Engage merchants, residents, and stakeholders to improve the business environment like media interaction, nightlife, and public accessibility
- Assist City departments, merchant/neighborhood organizations, property and business owners to promote and strengthen neighborhood-serving businesses
- Utilize language- and culturally-appropriate social media tools in association with activities in the Scope of Work

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide four (4) reports on each objective to the City's Team on/before the report due dates.

- Planning & Coordination Report;
- Outreach & Promotion Report;
- Business Attraction & Assistance Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- History, experience, and success implementing marketing campaigns/events in Chinatown neighborhood
- History of administering city-funded economic development projects
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal
- Success in coordinating business attraction and partnership to promote and strengthen neighborhood economic activities and community capacity
- High level of experience with effective communication and reporting skills for staff assigned to the project
- Knowledge of OEWD, Invest in Neighborhoods (IIN) Initiative, IIN Programs, and how your organization’s mission fits into the goals and objectives of OEWD and IIN

Preferred Qualifications:

- Applicant has access to community facilities that can be used for promotional projects

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Include a list of local merchant associations, family associations and community-based organizations with whom you have an established relationship. Briefly describe your relationship with each organization.
- Provide 2 letters of support from stakeholders that speak to your organization’s ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area D: Greater Chinatown Corridor Manager

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$100,000. Applicants may propose budgets up to **\$100,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown merchants

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to partner with OEWD to enhance and support the businesses in the Chinatown commercial corridor through business outreach, community networking, technical assistance, appropriate referrals, legacy business retention and improvement, industry-focused recruitment and development, storefront reactivation, and cultural preservation.

Activities may include, but are not limited to, the following:

- Conducting monthly outreach services to update businesses on vital City programs
- Conducting quarterly vacancy tracking and updating information of commercial inventories
- Providing needed information and referrals, documenting and coordinating service linkage, following up with IIN and businesses regarding service progress
- Developing a community-driven economic development strategy that focuses on business attraction and retention, and preserving cultural and historical assets in Chinatown
- Coordinating and facilitating bi-annual meetings to enhance stakeholders' engagement towards economic revitalization and community improvement
- Assisting City departments, merchant/neighborhood organizations, property and business owners in promoting and strengthening neighborhood-serving businesses

Performance Measures:

Grantee shall provide twenty (20) reports on each objective to the City's Team on/before the report due dates.

- Outreach & Vacancy Tracking Report;
- Business Process Improvement and Business Action Plan Report;
- Business Attraction Strategy Development Report;
- Business and Community Engagement Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco.
- A minimum of three years of history and/or experience, and success providing business-related supportive services to the Chinatown neighborhood
- A minimum of three years of history and/or experience administering city-funded economic and/or workforce development programs
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal

Preferred Qualifications:

- Success in spurring economic activities, supporting existing businesses, and increasing community capacity
- Success in organizing joint-effort and leveraging resources from city departments, local merchants and community partners

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Include a list of local merchant associations, family associations and community-based organizations with whom you have an established relationship. Briefly describe your relationship with each organization.
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area E: Chinatown Open Space Activation

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is \$50,000. Applicants may propose budgets up to **\$25,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown businesses and community stakeholders

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to activate open space(s) in Chinatown that will contribute to Chinatown's ongoing economic vitality through business and community collaboration, technical assistance, legacy business retention and improvement, storefront reactivation, and cultural preservation.

Activities may include, but are not limited to, the following:

- Establishing and managing a cultural hub that motivates community, cultural and business growth
- Formulating an Action Plan that serves as guidance towards the proper usage and maintenance of open space
- Obtaining consensus and support from business and property owners to increase public use and improve quality of life
- Facilitating community events to encourage public involvement and strengthen the neighborhood network

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide four (4) reports on each objective to the City's Team on/before the report due dates.

- Planning & Coordination Report;
- Outreach & Promotion Report;
- Business Attraction & Assistance Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to the Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- A minimum of three years of history and/or experience, and success providing business-related supportive services to the Chinatown neighborhood
- A minimum of three years of history and/or experience administering city-funded economic and/or workforce development programs
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal

Preferred Qualifications:

- Applicant has access to community facilities that can be used for promotional projects

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Include a list of local merchant associations, family associations and community-based organizations with whom you have an established relationship. Briefly describe your relationship with each organization.
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area F: Chinatown Quality of Life Improvement Projects

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is \$30,000. Applicants may propose budgets up to **\$15,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown businesses, residents, and community stakeholders

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to improve Chinatown's physical appearance and walkability that will contribute to Chinatown's ongoing economic vitality through business and community collaboration, technical assistance, and cultural preservation.

Activities may include, but are not limited to, the following:

- Fostering a thriving creative element in the corridor to showcase the district's commercial and cultural uniqueness
- Restoring historic business signs and/or lighting to attract visitors and improve safety
- Creating artwork and placards that evoke the character of the historic retail district
- Providing activities that support health, safety and cleanliness in the neighborhood, to encourage walking traffic and to extend visiting time
- Including local merchants and residents in designing and implementing phases

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide four (4) reports on each objective to the City's Team on/before the report due dates.

- Planning & Coordination Report;
- Outreach & Promotion Report;
- Event Advertisement & Facilitation Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- A minimum of two years of history and/or experience, and success conducting physical improvement projects in Chinatown neighborhood
- A minimum of two years of history and/or experience administering city-funded economic development and/or cultural appreciation project
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Include a list of local merchant associations, family associations and community-based organizations with whom you have an established relationship. Briefly describe your relationship with each organization.
- Provide 2 letters of support from stakeholders that speak to your organization’s ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area G: Chinatown Business-strengthening Projects

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is \$50,000. Applicants may propose budgets up to **\$25,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown

Target Population: Chinatown small businesses

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to partner with OEWD to launch and administer mini-size small business grants that focus on assisting the struggling and newly-established businesses in the Chinatown commercial corridor through technical and financial assistance.

Activities may include, but are not limited to, the following:

- Providing technical assistance to small businesses to open, stabilize, grow, etc.
- Conducting and monitoring at least twenty (20) result-based cases with measurable deliverables
- Implementing individual business strengthening projects to improve compliance with codes, expand revenue sources, enhance operational sustainability, etc.
- Assisting small businesses in building capacity and establishing partnerships with local merchant groups

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

Grantee shall provide four (4) reports on each objective to the City's Team on/before the report due dates.

- Business Screening & Assessment Report;
- Grant Application & Awarding Report;
- Business Process Improvement and Business Action Plan Report;
- Implementation & Evaluation Report.

Each report shall be completed and submitted by email to Project Manager for review and approval.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- A minimum of two years of history and/or experience, and success conducting business case management and operation improvement projects
- A minimum of two years of history and/or experience administering city-funded economic development and/or cultural appreciation projects
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal

Preferred Qualifications:

- Preference will be given to applicants with business-related educational campaign experience

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Include a list of local merchant associations, family associations and community-based organizations with whom you have an established relationship. Briefly describe your relationship with each organization.
- Provide 2 letters of support from stakeholders that speak to your organization’s ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area H: Excelsior Small Business Support & Neighborhood Improvement Projects

Anticipated Number of Awards: 1-3

Amount: Total amount of funding available under this program area is \$120,000. Applicants may propose budgets up to **\$75,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Excelsior Outer Mission

Target Population: Excelsior Outer Mission small business owners, community members with limited English proficiency, historically marginalized and/or underrepresented communities, women, and populations from low-income backgrounds.

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to partner with OEWD to enhance and support implementation of neighborhood improvement and small business support activities on the Excelsior Outer Mission Commercial Corridor.

OEWD is seeking proposals from nonprofit organizations to partner with OEWD to enhance and support implementation of activities on the Excelsior Outer Mission Commercial Corridor.

The Excelsior Outer Mission Neighborhood Strategy has an emphasis on supporting small businesses, building merchant capacity, and improving the public realm and the physical quality of the corridor. The Neighborhood Strategy can be viewed here: [Draft EOM Strategy](#)

The role of this work is to implement aspirations of small businesses, community, and OEWD in a practical and timely manner. Also, this work should focus on the urgent and evolving needs of small businesses and the community related to COVID-19 response and reopening.

OEWD is especially interested in being inclusive of small business owners and community members with limited English proficiency, historically marginalized and/or underrepresented communities, women, and populations from low-income backgrounds.

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

- COVID-19 response activities to assist small businesses
- Small business technical assistance support related to business retention and vacancy prevention and filling.
- Tactical and quick public realm improvements
- Small business storefront and sidewalk improvements, e.g. tables and chairs, planter boxes, lighting, awning, signage, cleaning, greening, paint

- Related permitting, fund distribution, and project management with contractors
- Connect businesses to related funding opportunities
- Manage contractors to complete stages of projects
- Outdoor space activation and related event support, e.g. street closures, night markets, festivals, marketplaces and related permitting and financial support
- Lease negotiation support for existing and new businesses
- Deployment and introduction of services for entrepreneurs
- Merchant organizing and capacity building strategies and implementation
- Liaison support between city agencies to help expedite and improve permitting for new and existing businesses
- Development of marketing materials and promotions for the neighborhood

Successful proposals will promote the economic well-being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

- Development of outreach plan to small businesses and stakeholders
- Demonstration of alignment with Excelsior Outer Mission Neighborhood Strategy

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Knowledge of the Excelsior/Outer Mission Neighborhoods
- Feasible and efficient budget
- Previous related experience
- Experience working with small business owners, designers, contractors, and City permitting agencies

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- How does your proposed project help to implement the small business and economic development goals and strategies outlined in the Excelsior Outer Mission Neighborhood Strategy?
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

- What economic development and small business activities do you think should be prioritized in the Excelsior and Outer Mission neighborhoods and how does your proposed project help to achieve this?
- Please describe your experience providing small business technical support and your understanding of OEWD's small business and neighborhood services.
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area I: Lower Fillmore Small Business Technical Assistance and Neighborhood Support

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$75,000. Applicants may propose budgets up to **\$75,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Lower Fillmore

Target Population: Lower Fillmore small business owners, sole proprietors, startups, micro-businesses

Scope of Work:

OEWD is seeking proposals from **non-profit organizations** to provide technical assistance to micro-businesses and small businesses on the Lower Fillmore Corridor

The Lower Fillmore Technical Assistance and Neighborhood Support grant was designed to assist small businesses and microbusinesses with group and one-on-one customized technical assistance consulting services. The proposed project should, at a minimum, provide direct access to the following professional services:

- Business tax preparation and accountant services
- Marketing support strategies and implementation tools for individual businesses and the Lower Fillmore Corridor as a whole
- Financial readiness (loan preparation, credit repair, financial literacy)
- Accelerated business permit support and compliance
- Direct service support to help outline and guide the process for obtaining necessary business documentation including: registration, business bank accounts, industry specific licenses and permits
- Provide workshops or training session on topics such as inclusiveness, marketing, volunteer management, financial management, or fundraising

Performance Measures:

- 30-60 unduplicated small businesses and micro businesses who utilized technical assistance
- 60% of all workshop and training participants enrolled in Financial Readiness
- 40-55 unduplicated individuals received assistance with obtaining loans, bank accounts, business licenses etc.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Experience in:
 - Administering city-funded economic and/or workforce development programming
 - Designing, coordinating, and implementing neighborhood events
 - Providing business-related supportive services to the Lower Fillmore
 - Promoting and Marketing small businesses
 - Establishing and maintaining effective partnerships with business owners, property owners, community organizations, and city agencies
 - Established relationships with local merchant associations and community-based organizations

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- What experience does your organization have working in the Fillmore? Please include a list of non-profits, small businesses, and organizations you have worked with and in what capacity.
- Provide in detail the development and implementation of a project you have run from beginning to end. In addition to any other details, include a list of projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s); challenges you faced to reach successful implementation; and how you solved those challenges to prevent them from coming up in the future.
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 3 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area J: Lower Fillmore Corridor Support

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$30,000. Applicants may propose budgets up to **\$30,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Lower Fillmore

Target Population: Lower Fillmore small businesses and commercial district

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to partner with OEWD to enhance and support the businesses on the Lower Fillmore corridor.

The Lower Fillmore Corridor Support grant is for a corridor manager to support small business services and commercial corridor activities including, but not limited to, the following:

- Build community partnerships through meetings and attendance at community events, including; special events, community board meetings;
- Plan, develop, implement and evaluate commercial revitalization programs serving primarily Lower Fillmore, including but not limited to business support and retention, public space activation and management, and commercial district marketing and promotion;
- Assess neighborhood conditions and needs by gathering and analyzing commercial district data through a rigorous district needs assessment process;
- Develop communication materials for local businesses, residents, and other stakeholders highlighting events or relevant services and programs;
- Facilitate conversations with a wide range of stakeholders on a range of complex issues and projects that impact the Lower Fillmore;
- Work closely with OEWD Project Manager and coordinate regularly with multiple City agencies.

Performance Measures:

- 10-20 unduplicated small businesses assessments
- 5-10 community events and meetings attended each month

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Applicant must possess experience in:
 - Assessing and data analysis on small businesses
 - Providing business-related supportive services to the Lower Fillmore
 - Promoting and marketing small businesses
 - Establishing and maintaining effective partnerships with business owners, property owners, community organizations, and City agencies
- Established relationships with local merchant associations and community-based organizations

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- What experience does your organization have working in the Fillmore? Please include a list of non-profits, small businesses, and organizations you have worked with and in what capacity.
- Provide details on business assessments and data analyses you have completed and the methods used.
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 3 letters of support from stakeholders that speak to your organization’s ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area K: Art Programming and Training for African American Youth

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$20,000. Applicants may propose budgets up to **\$20,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): District 5

Target Population: African American youth in District 5, with a focus on mentorship of young women

Scope of Work:

OEWD is seeking proposals from **Nonprofit** organizations to provide Arts programming and training for African American youth with a focus on mentorship of young women in the Western Addition of District 5.

Activities may include, but are not limited to, the following:

- Provide programming in the arts and interactive arts with a focus on creating opportunities for young women.
- Provide mentorship programs that empower African American youth.
- Provide safe and comfortable interactive art experiences.
- Provide programming online and other creative platforms to reach youth.
- Provide materials and needed supplies for youth to successfully participate in arts programs and training.

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

- Number of youth supported
- Number of events/activities held
- Number of mentorship opportunities

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Previous experience in working with youth of color

- Previous experience in running programs in District 5 neighborhoods, specifically serving Western Addition youth
- Previous experience in executing arts and design training

Preferred Qualifications:

- Partnerships with educational institutions

Supplementary Questions and Requirements:

- What is your experience in implementing arts programs to support young women of color?
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 1 letter of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area L: Calle 24 Latino Cultural District Economic Vitality

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$100,000. Applicants may propose budgets up to **\$100,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Mission

Target Population: Calle 24 Latino Cultural District business owners, property owners and residents

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to support collaborative efforts, coordination, engagement and implementation of Calle 24 Latino Cultural District economic vitality projects that will contribute to neighborhood vitality, increase economic activity and build upon existing efforts led by local leadership.

A strong proposal shall demonstrate a supportive structure deeply rooted and reflective of the community with the capacity to compensate, supervise, support staff and report on grant deliverables. It shall also include a detailed description of the coordination and implementation of activities. The budget shall reflect compensation for staff as well as operational and potential project budget for activities.

Projects and activities proposed under this program area may include, but are not limited to the following:

Partnerships, Coordination and Engagement

- Engage community and partners in providing input on projects that align with the Calle 24 Latino Cultural District Cultural History, Housing and Economic Sustainability Strategies (CHHESS) Report
- Collaborate and support activities that spur economic development, support existing businesses, improve physical conditions, increase quality of life, or build community capacity.
- Collaborate to support coordination of activities between multiple parties including, but not limited to: business owners, property owners, public agencies, nonprofit organizations
- Maintain relationships with City agencies and partners that support neighborhood efforts and can respond to needs
- Connect resources to Calle 24 Latino Cultural District partners and projects

- Conduct activities that leverage private resources, including financial commitments, in kind donations, volunteer time, etc.

Business Outreach and Strengthening

- Support attraction of neighborhood serving businesses that promote the history and strengthen the character of the neighborhood and specially those who have been part of historically disenfranchised communities
- Provide services and referrals that will strengthen small businesses and increase their longevity in the corridor
- Conduct regular door to door business owner outreach to assess needs, connect businesses to programs and projects and provide referrals and support
- Develop relationships with business owners, property owners and nonprofit partners to:
- Follow up with businesses on progress of services and referrals
- Support troubleshooting issues between small businesses and city
- Promote and provide information of City services and programs to business owners

Programs to be promoted and delivered to businesses in corridor may include, but are not limited to:

- ADA compliance and awareness
- Reopening Support
- Lease Negotiations
- Marketing assistance
- Permitting resources
- Legacy business registry
- Small business grants

Cultural Heritage and Marketing

- Collaborate to support the development and implementation of a district marketing campaign centering on unique history and culture of the Calle 24 Latino Cultural District to promote neighborhood businesses and encourage customers to visit the business district.
- Collaborate to support commercial district marketing and branding
- Conduct activities and launch projects that complement and enhance existing efforts that support activities that celebrate, strengthen cultural heritage while spurring economic activity.

Performance Measures:

Reporting requirements include:

- Documentation of meetings and engagement of partners as needed for projects
- Regular progress reports and tracking project deliverables with appropriate data and tools.
- Tracking coordination efforts, projects and status

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Applicant and/or implementing partner must be an established organization within the Mission District
- Applicant must be physically located in Calle 24 Latino Cultural District.

Preferred Qualifications:

- Applicant has an established community organizational structure with experience implementing economic development projects

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide at least 1 letter of support from a collaborative partner that speaks to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area M: North Beach Street Conditions Program and Activation

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$15,000. Applicants may propose budgets up to **\$15,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): North Beach

Target Population: North Beach small business owners and commercial district

Scope of Work:

Proposals are being sought by OEWD from **nonprofit organizations** to implement programming and projects that address cleanliness and street conditions in the North Beach community. Proposals should contribute to neighborhood vitality by strengthening small businesses, improving physical conditions, increasing quality of life, and building community capacity.

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

- Neighborhood activations and safe events (e.g., art walks, closed streets, etc.)
- Installing public art, murals, neighborhood landmarks
- Neighborhood beautification and street cleaning
- Engaging non-English-speaking stakeholders
- Community safety efforts

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures:

- Number of Businesses supported
- Number of activations
- Number of individuals participating/attending

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Past experience implementing capacity building and cleaning programs that contribute to the vitality of North Beach.

- Have a presence in and connection to the North Beach Community
- Applicant must be physically located in North Beach.

Preferred Qualifications:

- Collaboration with the existing neighborhood and residential organizations

Supplementary Questions and Requirements:

- What experience do you have in implementing a capacity-building program that contributes to neighborhood vitality and supports equity goals?
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area N: Leland Avenue Visitacion Valley Greenway Project

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$25,000. Applicants may propose budgets up to **\$25,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. See Appendix D for more details. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Visitacion Valley

Target Population: Visitacion Valley residents and businesses

Scope of Work:

OEWD is seeking proposals from **nonprofit and for-profit organizations** to partner with OEWD to fund activities that support the Visitacion Valley Greenway as an asset that connects neighborhood residents to the Leland Avenue commercial corridor.

The Scope of Work for the selected organization(s) in this program area may include, but is not limited to the following:

- Projects that support maintenance and beautification activities within the greenway
- Educational activities that promote the history and character of the neighborhood
- Activities that engage a diverse neighborhood audience to support the maintenance of the greenway
- Activities that support the enhancement and beautification of Leland Avenue greenway entrance and connection to the greenway

Performance Measures: None specified

Minimum Qualifications:

- Applicant must be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco.

- Applicant must partner with one or more local Visitacion Valley organizations, residents and/or businesses to implement project activities.

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- Proposal should reflect experience implementing activities within greenways
- Proposal should describe how activities will support enhanced connectivity to the Leland Avenue corridor
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide at least 1 letter of support from partners named in the proposal that speaks to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area O: SF Shines Window Display

Anticipated Number of Awards: 1-5

Amount: Total amount of funding available under this program area is \$125,000. Applicants may propose budgets up to **\$25,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Chinatown, Central Market/ Tenderloin, Lower Fillmore, Mission, Bayview, Excelsior

Target Population: Small business owners with limited English proficiency, historically marginalized and/or underrepresented communities, women, and populations from low-income backgrounds.

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations**.

Organizations will partner with OEWD to enhance and support the SF Shines Window Display program, which provides temporary creative installations in storefronts.

- Create a process by which small businesses and/or property owners can apply to participate in the window display program
- Create an outreach strategy to the target population
- Select qualified designers and match them with appropriate storefronts
- Manage business and designer relations
- Plan a public event and/or marketing strategy to promote the project
- Document the project with photographs and a post-project survey
- Work collaboratively with OEWD to assist business owners in navigating other municipal resources that are available for business stabilization

Performance Measures:

- Number of businesses engaged,
- Number of installations in vacant storefronts,
- Percentage of businesses from target population,
- Number of people engaged through event and/or marketing,
- Before and after photos

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

- Previous experience working with designers, and/or small business owners in the chosen neighborhood

Preferred Qualifications:

- Connections to local designers who are able and willing to participate in the project.
- Language capacity in Spanish, Cantonese, Mandarin, and Filipino.
- Understanding of visual identity, branding, and merchandising for small businesses
- Strong understanding of neighborhood history and culture including visual language and cultural aesthetics.

Supplementary Questions and Requirements:

- If applicable, please provide examples of any past projects working with small business owners on window displays, merchandizing or other visual identity enhancement projects.
- If applicable, please provide examples of past projects working with artists or designers in spaces not traditionally used for art.
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area P: SF Shines Storefront Improvement

Anticipated Number of Awards: 1-3

Amount: Total amount of funding available under this program area is \$500,000. Applicants may propose budgets up to **\$250,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: Small business owners with limited English proficiency, historically marginalized and/or underrepresented communities, women, and populations from low-income backgrounds.

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to administer a Storefront Improvement Program on commercial corridors.

Storefront improvements may include, but are not limited to, architectural and branding design services, equipment and furniture for health and safety compliance, painting, signage, power washing, minor repairs, etc. Mini-grants are expected to be up to \$5,000 each. City grants are reimbursable so organizations must have capacity to cover mini-grant costs for at least 30 days.

Note: All projects must obtain the necessary City permits and any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible for a contract award. Please visit <http://sfgov.org/olse/prevailing-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

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

- Outreach to neighborhood organizations and small business owners with an emphasis on those with limited English proficiency, minorities, women, and other populations from low-income backgrounds.
- Facilitation of design process, if needed.
- Facilitation of City permitting and verification of contractor license, insurance, and prevailing wage compliance, if needed.
- Management of construction process to ensure quality and deadlines are met.
- Management of all vendors/contractors.
- Financial management and administration of construction grants.

Performance Measures:

- Number of small businesses supported
- Scope of work of projects
- Before and after photos of projects
- Award amounts per project

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Previous experience working with small business owners especially those with limited English proficiency, minorities, women, and other populations from low-income backgrounds.
- Knowledge of design, permitting, and/or construction process and requirements.
- Financial capacity to cover fund disbursements totaling up to \$30,000 per month.

Preferred Qualifications:

- Understanding of requirements to meet current health and safety standards for small business operation.
- Understanding of visual identity and branding for small businesses
- Strong understanding of neighborhood history and culture including visual language and cultural aesthetics.
- Experience with City permitting process for commercial space improvements.
- Strong knowledge of construction materials, processes and equipment.
- Knowledge of prevailing wages and competitive bidding processes.
- Language capacity in Spanish, Cantonese, Mandarin, and Filipino.

Supplementary Questions and Requirements:

- If applicable, please provide examples of any previous commercial space improvement projects with before and after photos and a description of the organization's role in the projects.
- Please include the projected number of mini-grants to be administered in the proposal. A strong proposal shall demonstrate proper resources and competitive administrative overhead costs to perform the services.
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area Q: Community Benefit District/Business Improvement District Organizational Support

Anticipated Number of Awards: 1-4

Amount: Total amount of funding available under this program area is \$80,000. Applicants may propose budgets up to **\$20,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Established Community Benefit Districts and Business Improvement Districts within the City and County of San Francisco.

Target Population: Businesses, residents and property owners comprising the Community Benefit Districts/Business Improvement Districts

Scope of Work:

The purpose of this program area is to provide funding to existing Community Benefit Districts (CBD) and Business Improvement Districts (BID) to strengthen the organizational effectiveness of their management corporation.

OEWD is seeking proposals from **existing Community Benefit Districts (CBD)/Business Improvement Districts (BID)** to collaborate with OEWD to enhance and support existing CBDs/BIDs. The purpose of this program area is to provide funding to existing CBDs to strengthen the organizational effectiveness of their management corporation. The grants can assist groups with strategic planning, business attraction, business technical assistance, volunteer management, renewal, district improvements, and improved fundraising.

OEWD's primary goal is to advance the management corporation's ability to carry out strategic goals and make the management corporations more sustainable. OEWD is offering this funding as a matching grant to assist organizations in defraying costs, therefore leveraged funding is required.

Performance Measures:

- Strategic Planning: A completed strategic plan, including an implementation plan
- Business Attraction: Number of new businesses opening within a specific area of a CBD/BID zone or throughout the district
- Business Technical Assistance: Number of businesses assisted
- Renewal: A completed management district plan and engineer's report
- Due to the wide variety of subjects not all potential performance measures may be covered above. In general, applicants should think of metric-based performance

measures. Applicants and the OEWD Project Manager shall determine performance measures if a grant is awarded to the organization.

Minimum Qualifications:

- Applicant must be a fully established CBD/BID entity eligible to do business with the City and County of San Francisco.
- The proposed budget for this Program Area must include leveraged, private resources (e.g. financial commitments, in-kind donations, volunteer time, etc.).

Preferred Qualifications:

- Personnel with experience in implementing the proposed project/program.

Supplementary Questions and Requirements:

- Indicate how the CBD/BID plans to maintain the activities included in the proposal after the grant is exhausted and without City support, or if it is a one-time request
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area R: Community Benefit District/Business Improvement District Impact Analysis

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$200,000. Applicants may propose budgets up to **\$200,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. See Appendix D for more details. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Not applicable

Target Population: Businesses, residents and property owners comprising the Community Benefit Districts/Business Improvement Districts

Scope of Work:

OEWD is seeking proposals from **both nonprofit and for-profit** organizations.

OEWD is seeking proposals to update and expand on the 2012 impact analysis to determine the impact of Community Benefit Districts (CBD) and Business Improvement Districts (BID) in the City and County of San Francisco. The analysis will be used to educate the public at large, City departments, and elected officials on what CBD/BIDs do and the program's overall and specific impact.

San Francisco's Community Benefit District(CBD) and Business Improvement District (BID) program was established in 2005 with the passage of Article 15 of the San Francisco Business and Tax Regulations Code and the creation of a technical assistance program by then Mayor Gavin Newsom. In 2012, a CBD Impact Analysis was headed by the OEWD. Data was gathered from City agencies, external data providers, Certified Public Accountant audited financial statements, and a survey instrument administered to CBD/BID executive directors.

In summary, the data and research synthesized by OEWD's evaluation provides strong justification for the continuation of City support for the CBD/BID programs, and for making new investments in neighborhood commercial districts. The full report can be found here: [2012-2013 CBD Impact Analysis](#).

Since 2012-2013 the CBD/BID program has grown significantly. OEWD is seeking proposals to update and expand on the 2012 impact analysis to determine the impact of CBD/BID in the City and County of San Francisco.

This impact analysis will be used to educate the public at large, City departments, and elected officials on what CBD/BID do and the importance of the programs to the City and County of San Francisco. The impact analysis report will be co-authored with OEWD.

Grantee will work with OEWD to develop the specific framework and research areas for the impact analysis report, but it should closely follow the outline set forth in the 2012-2013 CBD Impact Analysis:

1. Foreword
2. Executive Summary
3. San Francisco's CBD/BID program
4. CBD/BID Profiles
5. Evaluation
6. Selected Data and Charts
7. Acknowledgments
8. Sources

Grantee and OEWD shall work to make the impact analysis as replicable as possible to ensure parity with future similar projects. Grantee may partner with other institutions, as needed, to complete the impact analysis.

Performance Measures:

Final Impact Analysis: A completed and finalized CBD/BID impact analysis report and all accompanying data, analysis, and evaluation.

Minimum Qualifications:

- Applicant must be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco.
- Applicant has experience in providing data and metric based analysis.
- Applicant has experience in data gathering and evaluation.

Preferred Qualifications:

- Familiarity and understanding of Community Benefit/Business Improvement Districts
- Key personnel with experience in data/metric based evaluations and analysis
- Applicant is registered to do business in the State of California

Supplementary Questions and Requirements:

- Describe the proposed methodology and timeline to provide an impact analysis of the CBD/BID program.
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area S: Commercial Loans – Revolving Loan Fund

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$575,000. Applicants may propose budgets up to **\$575,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide, but focus on opportunity neighborhoods:

- Bayview
- Lower Fillmore
- Central Market/Tenderloin
- Mission
- Chinatown
- Excelsior

Target Population: Small business owners

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to develop and support the City-sponsored Revolving Loan Fund (RLF) that provides loans and consulting services to the City's micro and small businesses with a focus on IIN communities.

OEWD is seeking proposals from nonprofit organizations to develop and support the City-sponsored Revolving Loan Fund (RLF) that provides loans and consulting services to the City's micro and small businesses with a focus on IIN communities. The objectives of the RLF are to support the following:

- Economic development efforts directed at revitalizing and strengthening targeted commercial neighborhood corridors throughout the City; and
- Job creation and retention efforts that create and/or retain permanent full-time jobs filled by low- to moderate-income San Franciscans; and
- Investment and economic growth where other financing sources are not available.

Applicants may propose a grant of up to \$75,000 to support the RLF Program. OEWD prefers to reimburse grantee on a deliverable basis, e.g., per loan funded or as a percentage of amount funded, but is open to other grant reimbursement methods to ensure support of program and organization capacity. The proposal may include thoughts on how program income can be used to apply to operations and maintenance of the RLF.

The City may provide up to \$500,000 in lending capital to seed the RLF. Funds for the RLF are being made available through the Economic Development Administration (EDA) CARES Act Revolving Loan Funds.

Successful applicants and RLF borrowers must comply with all relevant EDA and City regulations and policies. RLF lending capital and all principal repayments shall be deposited and revolved in the RLF in perpetuity. As additional resources become available, additional funds may be added to the RLF. RLF loan amounts and terms may be adjusted accordingly with prior approval by OEWD.

A strong proposal shall demonstrate a supportive structure with the capacity to leverage non-City funds for lending capital, match funds or additional resources to support operations, an outreach plan to micro and small businesses in San Francisco that focuses on businesses along IIN commercial corridors as well as the ability to provide technical assistance and resources to businesses during and beyond the terms of the loan.

Performance Measures:

The proposed RLF program should meet each of the following criteria:

- Include an outreach and marketing plan that is responsive to the needs of the City’s culturally and linguistically diverse small businesses in startup and expansion phases; and
- An RLF product structured with few barriers in terms of costs and ease of access particularly to women entrepreneurs, immigrant and minority small business owners, low-income families, and other groups facing marked difficulties accessing traditional financing. IIN welcomes products and programs designed with creative solutions to remove barriers to access: shorter timelines to access funds, reduction of paperwork, easing credit criteria, healthy loan loss reserve to mitigate RLF portfolio loss, low interest and longer-term loans, higher than standard loan-to-value requirements, lower than standard debt service coverage ratios and more flexible than standard security requirements; and
- Consulting program to help businesses evaluate the risks and costs to startup and expansion efforts in the City, and consulting services for the duration of the loan term with goals toward stabilization and growth.

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Qualified applicants must demonstrate experience providing similar lending and consulting services and demonstrate the ability to deliver services through collaborative efforts, particularly with the City and County of San Francisco, commercial corridor

programs, and community-based business technical assistance and entrepreneurship training organizations.

- Applicants must be San Francisco-based or operate a San Francisco office.
- Applicants should be Community Based Development Institutions (CDFI) as certified by the CDFI Fund under the US Treasury Department; or demonstrate that they are on the path to achieve such status within calendar year 2021; or have a California Lender's License with experience lending to and consulting with small businesses.
- Applicants must be able to assist borrowers funded with federal sources, comply with all applicable environmental review clearance, bidding procedures, and state and federal prevailing wage requirements.
- Applicants must comply with all applicable local and federal government regulations including the ability to document jobs created and retained as a result of funding provided to the borrower.

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

Please address the following questions in your agency's proposal:

- Describe your organization's track record lending to San Francisco-based small businesses over the past two years, including lending volume, delinquency and write-off rates.
- Describe the demographic characteristics of the target audience in need of the loan product and services being proposed.
- Describe how the loan product and services shall be structured to reach the target audience.
- Describe success for the program and specific, measurable and realistic outcomes for the targeted program.
- Describe any challenges your organization faced in lending to small businesses in San Francisco in the past and your organization's strategies to overcome these challenges.
- Describe strategies and activities that exhibit cultural competencies reaching and working with populations that are lower-income and racial/ethnic minorities.
- Describe your program staff's and Board of Directors' management and leadership experience to provide direction to the organization to successfully carry out its programs; and have adequate representation of program beneficiaries.
- Describe any fees/costs to clients that would be associated with RLF and justification for fees/costs. Please include detailed SF RLF program budget and how the different grant, program income, and leveraged funds will support and sustain the program.
- Describe your experience managing a City Revolving loan fund funded with Economic Development Administration (EDA) funds.

- Describe your experience providing pre-loan and post-loan one-on-one business counseling to borrowers.
- Describe a client success story including how the loan product and assistance from your organization attributed to the success of the business.
- Describe a client that received program loan and services, but was not able to succeed in the City. What were the contributing factors and how will the program be structured to better inform clients of these potential pitfalls?
- Please provide 3 references from small business clients in the past year that can speak to the product and/or services your organization provided.'

Program Area T: Public Space Improvement Services

Anticipated Number of Awards: 1-6

Amount: Total amount of funding available under this program area is \$500,000. Applicants may propose budgets up to **\$250,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: San Francisco public space stakeholders including residents and businesses

Scope of Work:

Public space is crucial to San Francisco's ability to persevere through the COVID crisis and will be critical if we are to see through a meaningful, equitable civic and economic recovery that has our City emerge stronger than it was prior to COVID. OEWD is seeking proposals from **nonprofit organizations** to partner with government agencies and community stakeholders to improve and manage multiple public spaces across the City, in alignment with the City's Recovery Plan goals of catalyzing neighborhood recovery and supporting cleanliness, health and safety in public spaces.

Proposals may provide any of the following types of services:

- Cleaning, public health and/or safety services with particular focus on workforce development partnerships and/or efforts to hire dislocated workers.
- Public space activation and/or beautification services including programming, events, and arts activation, and landscaping.
- Public space improvement project planning, community engagement, fundraising, and implementation, and evaluation.
- Marketing, promotion and other communications to improve the perception of the City's public spaces.
- Administrative services (i.e. fiscal sponsorship, grant management, executive and administrative staffing, insurance, subcontracting, fundraising).

Successful proposals will promote the economic well being of community, promote public health and safety, and demonstrate an ability to follow public health guidelines.

Performance Measures: None specified

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Track record of providing shared services to community-based groups.
- Track record in working in multiple place types and multiple space locations across San Francisco.
- Track record in working with multiple jurisdictions and agencies that own public spaces.
- Track record in fundraising for the type of projects proposed
- Track record of partnering with community-based groups and securing community consensus for project direction, including in high-risk communities and communities of color.
- Track record of effectively completed projects with budgets over \$100,000.
- Track record of working with a variety of vendors around public space cleaning, programming and administrative services.
- Track record of doing business in San Francisco and contracting experience with the City and County of San Francisco is desired.

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area U: Real Estate Case Management Services

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is \$200,000. Applicants may propose budgets up to **\$200,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. See Appendix D for more details. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Citywide

Target Population: San Francisco businesses, residents and landlords impacted by vacant storefronts

Scope of Work:

OEWD is seeking proposals from **both nonprofit and for-profit** organizations to provide commercial real estate broker services to support a storefront activation and retention program.

Activities under this section may include:

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

Performance Measures: None specified

Minimum Qualifications:

- Applicant must be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco.

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

Preferred Qualifications:

- California licensed real estate broker

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area V: Small Business and Commercial Property Owner Legal Support Services

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$50,000. Applicants may propose budgets up to **\$50,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: Small Business Owners

Scope of Work:

OEWD is seeking proposals from **non-profit organizations** to provide legal and non-legal support to small business owners and commercial landowners on a Citywide basis to prevent conflict, mediate, and resolve lease and related disputes in various languages and in a culturally appropriate manner.

- **Mediation** – Provide triage and client consultation and situational analysis, individual conflict coaching, and conflict navigation, including but not limited to two-party or more negotiation through confidential mediated dialogue with a professional neutral party. Provide case management where matters require ongoing support.
- **Legal Consultation** – Provide holistic legal consultation with a licensed attorney, when appropriate, who focuses on pertinent business tenancy issues, situational review, and matters that may not require ongoing case management.
- **Lease and Contract Review** – Provide specialized lease contract review with a professional or a licensed attorney who focuses on legal issues relating to commercial leases.
- **Non-legal Consultation** – Provide non-legal triage, counseling, consultation, and education with experts in tenant-landlord matters.
- **Educational Seminars** – Provide educational workshops and materials for Small Business Owners/Managers. This may include, but is not limited to course design, preparation of online materials, outreach (including print mailers), marketing, coordination, and both online and in-person classes, if appropriate.

Performance Measures:

- Number of Classes/Group Trainings
- Number of Businesses supported
- Number of conflicts/issues resolved

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Experience and history in providing legal and non-legal lease support to small businesses in San Francisco
- Understanding of the San Francisco Small Business Community
- Understanding of the pressing COVID impacts on Small Businesses

Preferred Qualifications:

- Located in San Francisco

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 2 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area W: Business Development and Technical Assistance Grant for Black Transgender and Gender Nonconforming Small Businesses and Entrepreneurs

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is \$250,000 for a two year period. Applicants may propose budgets up to **\$250,000** for twenty-four months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more. This program area will be deployed in partnership with the Human Rights Commission (HRC) using reallocated funding from the SF Police Department.

Eligible Neighborhood(s): Citywide

Target Population: Black transgender and gender-nonconforming-led small businesses

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to support Black transgender-led and gender nonconforming-led small businesses with capacity building services, technical assistance, and business development programs. The purpose of this proposal is to expand economic and entrepreneurship opportunities for Black transgender and gender nonconforming small businesses.

Activities may include, and are not limited to, the following ways of supporting Black transgender and gender nonconforming small businesses:

- Provide counseling, training, and research assistance to assist small businesses who are launching, growing, and innovating.
- Offer capacity building services, technical assistance, and business development programs in order to strengthen existing businesses
- Support businesses with securing business licenses, permits, and other administrative needs.
- Support small businesses and entrepreneurs with emerging needs on an ongoing basis
- Provide financial assistance in the form of microgrants for business start-up costs on an as-needed basis

Performance Measures:

- Number of businesses served
- Amount of resources leveraged
- Number of jobs created

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco
- Demonstrate a deep and meaningful connection to the Black transgender and gender nonconforming communities that can serve as a basis for a business incubator that is racially equitable and reflects the community of service.
- Demonstrate a history of providing services to the Black transgender and gender nonconforming communities within San Francisco.
- Respondent must be in good financial standing according to generally accepted accounting practices.

Preferred Qualifications:

- Organization's mission, values, and programs are working to advance economic empowerment initiatives supporting Black Transgender and gender nonconforming communities in San Francisco
- Services are supporting communities located in San Francisco's Tenderloin and South of Market of neighborhoods
- Experience working with Black transgender and gender nonconforming communities who are formerly incarcerated, justice involved and/or marginally housed.

Supplementary Questions and Requirements:

- How will the proposed project contribute to economic empowerment initiatives and build up existing efforts led by Black Trans-led organizations?
- Define the communities served by the proposed project, and describe how the strategy and marketing plan are relevant to the communities of service.
- How will the proposed project outcomes be accomplished within twenty-four months?
- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area X: Accelerate Manufacturing

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$90,000. Applicants may propose budgets up to **\$90,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: Manufacturers

Scope of Work:

OEWD is seeking proposals from **nonprofit** organizations.

The goal of OEWD's sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment. We are seeking an organization to provide assistance to help strengthen San Francisco's production sector and encourage businesses to start, stay, and grow in San Francisco.

Manufacturing has a great history in San Francisco and is in the midst of a resurgence. The City wants to do whatever it can to support this and sees this body of work as a key component of that support.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in target sector. Identify businesses at risk of leaving San Francisco, business expansion opportunities, businesses that would benefit succession planning resources and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- **Real Estate Assistance:** Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- **Information Clearinghouse:** Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners, etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.

- **Workforce:** Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Connect to Assistance Programs:** Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- **Local Purchasing Campaigns:** Develop, support and execute outreach campaigns to encourage and facilitate local shopping by customers as well as business to business (B2B) purchasing relationships.
- **Information Resources:** Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Sector-wide Efforts:** Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Marketing:** Identify opportunities for made in San Francisco production businesses to be highlighted in different media outlets, social, print, television, etc.
- **Refer to the City:** Refer business issues to OEWD or relevant City department.
- **Reporting:** Conduct a comprehensive annual survey of companies including data on revenue, new sales, hires and feedback on programming provided. Track, measure and regularly report on outcomes.

Performance Measures:

- Number of businesses provided with real estate assistance
- Number of signed leases
- Number of businesses supported with permitting assistance
- Number of job referrals and placements made
- Number of businesses provided with intensive business counseling
- number of business connections to new customers facilitated
- Data collection on the status of the industry and local businesses

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

Preferred Qualifications:

- Organization has existed for at least one year and has a minimum of one year of experience in the type of program/project proposed

- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area Y: Distribution and Repair Business Development

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$45,000. Applicants may propose budgets up to **\$45,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: Distribution and Repair Businesses

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations**.

The goal of OEWD's sector strategies is to attract, retain and support the start and growth of businesses in targeted industries, driving job creation and retention in addition to promoting tourism, local exports and investment. Distribution and Repair Sector Business Development is a technical assistance program to help strengthen San Francisco's distribution and repair sector and encourage businesses to start, stay and grow in San Francisco.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, in person outreach to businesses in target sectors. Identify businesses at risk of leaving San Francisco, business expansion opportunities, and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government. Maintain and expand database of distribution and repair businesses and supporting services in San Francisco. Work to identify businesses that should be considering succession planning and refer to relevant programming.
- **Real estate assistance:** Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market and aggregate demand.
- **Information Clearinghouse:** Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, technology etc). Serve as an information clearing house regarding local policy development that may impact businesses.
- **Connect to Assistance Programs:** Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.

- **Information Resources:** Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations and multi-media and should take into consideration the benefit of in-person interactions with these businesses.
- **Workforce:** Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Refer to the City:** Refer business issues to OEWD or relevant City department.
- **Sector-wide Efforts:** Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for workforce training programs, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Reporting:** Track, measure and regularly report on outcomes.

Performance Measures:

- Number of 1:1 consultations with businesses
- Number of businesses receiving real estate assistance
- Number of businesses receiving referrals
- Number of unduplicated businesses receiving service

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

Preferred Qualifications:

- Organization has existed for a minimum of one year and has at least one year of experience in the type of program/project proposed
- Experience managing the type of program/projects proposed in a city of similar or greater size
- Key personnel with experience in the type of program/project proposed

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area Z: FashionSF

Anticipated Number of Awards: 1-3

Amount: Total amount of funding available under this program area is \$60,000. Applicants may propose budgets up to **\$30,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: Apparel and accessory designers and manufacturers, both existing and new

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations**.

FashionSF is a fashion-based business development program. The goal of FashionSF is to support the expansion of existing designers and manufacturers in the apparel and accessory sector, facilitate connection between designers and manufacturers, and support new company startup and growth.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in target sector. Identify businesses at risk of leaving San Francisco, business expansion opportunities and businesses looking to move to San Francisco. Providers should ensure that they will connect with businesses across the city representing different backgrounds and subsectors of the fashion industry. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- **Real Estate Assistance:** Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- **Information Clearinghouse:** Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.
- **Connect to Assistance Programs:** Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.

- **Information Resources:** Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Workforce:** Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Sector-wide Efforts:** Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. connecting designers to local manufacturers, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Refer to the City:** Refer business issues to OEWD or relevant City department.
- **Marketing:** Identify opportunities for made in San Francisco designers to be highlighted in different media outlets, social, print, television, etc.
- **Reporting:** Track, measure and regularly report on outcomes.

Performance Measures:

Including but not limited to the following:

- Number of businesses receiving 1:1 counseling
- Number of businesses receiving educational programming/workshops/classes
- Number of businesses provided with marketing opportunities
- Number of referrals made to designer/manufacturing business
- Number of job referrals facilitated
- Number of referrals provided to businesses
- Number of businesses provided real estate consultations

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

Preferred Qualifications:

- Organization has existed for a minimum of one year and has at least one year of experience in the type of program/project proposed
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area AA: SF Biz Connect

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$60,000. Applicants may propose budgets up to **\$60,000** for twelve months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: San Francisco local business enterprises

Scope of Work:

OEWD seeks a **nonprofit organization** to support businesses in developing connections to additional business opportunities by conducting business outreach, education, and development support through shop local programs and coalition building between target sectors currently operating in, or wanting to relocate to, the City of San Francisco. Target sectors include small businesses, life sciences, health care, nonprofits, tourism, financial and professional services, education, technology, clean technology and others as identified by OEWD.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in target sectors with emphasis on services for our Local Business Enterprises.
- **Local Purchasing Campaigns:** Develop, support and execute campaigns to encourage and facilitate business to business (B2B) purchasing relationships and educate the public on the importance of the smallbusiness community as well as shopping locally.
- **Coalition building:** Support sector-wide efforts that benefit businesses across target sectors. Activities may include supporting networking activities; addressing sector-wide challenges; and pursuing other catalytic opportunities.
- **Marketing:** Identify and create opportunities for local businesses to be highlighted in different media outlets, social, print, television, events etc.
- **Information Resources:** Provide information through print, web and social content which supports business customer relationship development. This could include case studies, fact sheets, presentations, and multi-media.
- **Reporting:** Conduct a comprehensive annual survey of companies including data on revenue, new sales, hires and feedback on programming provided. Track, measure and regularly report on outcomes.

Performance Measures:

- Number of recurring business relationships facilitated
- Number of unique businesses supported
- Number of marketing events proposed
- Number of outreach events attended
- Number of business organizations engaged

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

Preferred Qualifications: None specified

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?
- Provide 3 letters of support from stakeholders that speak to your organization's ability to implement the activities proposed in the Application and demonstrate community support for the proposal.

Program Area BB: Shop & Dine in the 49

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is \$60,000 (\$30,000 per year for the next two years). Applicants may propose budgets up to **\$30,000** for twelve months, or \$60,000 for twenty-four months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

Target Population: San Francisco local small businesses

Scope of Work:

OEWD seeks a **nonprofit organization** to support conducting business outreach, education, business development support for shop local programs.

OEWD developed sector-based business development initiatives based on target industries identified in the City's Economic Strategy. The goal of OEWD's sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment.

Within these strategies, OEWD has developed programs that encourage residents and visitors, alike, to support and shop at small businesses that are local to San Francisco. As such, OEWD seeks an organization to support conducting business outreach, education, events, business development, and other economic development activities that support shop-local programs.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in order to recruit them into participating in shop-local activities and events.
- **Event Coordination and Planning:** Support OEWD and partners in coordinating and managing a minimum of two pop-ups which support small local makers, and plan a minimum of four events per year that support buy-local.
- **Innovate:** Identify and/or rollout additional activities and event formats that will provide auxiliary programming and opportunities to promote businesses in shop-local initiatives, and stimulate neighborhood economies in manners that assure continued public health.

Performance Measures: None specified

Minimum Qualifications:

- Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco

Preferred Qualifications:

- Organization has existed for a minimum of two years and possesses at least two years of experience in the type of program/project proposed
- Experience managing the type of program/projects proposed in a City of similar or greater size than San Francisco

Supplementary Questions and Requirements:

- How does your proposal consider and respond to the realities of COVID-19 and the urgent and evolving needs of small business and community stakeholders impacted by the pandemic?

Program Area CC: Human Centered Design/Innovation: Organizational Development Projects for Youth, Education, and Opportunity

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is anticipated to be \$50,000. Through this RFP, applicants may submit budget requests between **\$25,000 - \$50,000** for a service period of up to 12 months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. See Appendix D for more details. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Citywide

Target Population: OEWD staff (~130 individuals) and OEWD funded partners (nonprofit organizations, consultants and contractors) serving San Francisco high-school aged opportunity youth, defined as youth between the ages of 16-24 that are disconnected from school and work.

Scope of Work:

OEWD is seeking proposals from both **nonprofit and for-profit organizations**.

OEWD is seeking proposals to support its organizational development as well as that of its partners, grantees and stakeholders through human-centered design/innovation.

The scope of work may include a variety of organizational development projects based on human-centered design methodology and emerging research in related fields of technology, futurism, complexity theory, strategic planning, and equity work.

Proposals will be considered for the following activities:

- Designing, evaluating and coordinating projects, programming, and initiatives focused on both San Francisco Unified School District K-12 opportunity youth (high school age preferred) as well as collaborations with post-secondary students and/or institutions that amplify those efforts. The specific focus of this work is to develop pathways for students to access professional / post-secondary opportunities and to expand social capital, networks, and student-centered career exploration.

Proposals in this area may intersect with ongoing efforts at the Office of Economic and Workforce Development, including:

- Implementation of the OEWD Racial Equity Action Plan, which details OEWD’s key role and commitment to ensuring equitable and inclusive outcomes in San Francisco. This work may begin as soon as Spring 2021, and may continue through Fiscal Year 2023-2024. For more information, visit <https://www.racialequitysf.org>
- Implementation of recommendations of San Francisco’s Economic Recovery Task Force. This work has begun and is expected to continue through Fiscal Year 2023-2024. For more information, visit <https://www.onesanfrancisco.org/covid-19-recovery>

Minimum Qualifications:

- Be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco
- Experience training, consulting, and/or researching and developing human-centered design for business, government, education, non-profit, etc. with measurable positive results
- Experience using human-centered design to develop programming for youth and educators in the K-12 space
- Experience teaching/coaching human-centered design in a K-12 educational setting
- Knowledge and understanding of complex educational systems, trends, and issues
- Design practice deeply rooted on equity work, especially racial equity

Preferred Qualifications:

- Recognized leadership in human-centered design/innovation
- Demonstrated success applying human-centered design/innovation to organizational development for business, education, government, non-profit, organizational development, technology, product design, program development, etc.
- Fusion-based approaches: Experience fusing human centered design with complexity theory, emerging technology, futures-based thinking, and/or other current research in the field of design thinking
- Experience training, facilitating, coaching in the aforementioned fusion-based approaches with measurable positive results in organizational services, products, and/or culture
- Experience applying human-centered design in a career development context for K-12 youth, especially high-school aged youth
- Experience working in collaboration with large school districts, especially with SFUSD
- A focus on educational equity issues

Supplementary Questions and Requirements:

Please address the following question in your proposal narrative:

- How will you measure successful integration of human-centered design into OEWD operations, programs, projects, services, and culture in the context of equity-based youth development?
- How does your proposal consider and respond to the realities of COVID-19?

Additionally, please submit all of the following as supplementary attachments to your proposal:

- Between 2 and 5 case studies from prior, similar projects, collaborations or contracts with public institutions
- 3 professional references from clients of prior, similar projects, collaborations or contracts, including email and phone contact information

Program Area DD: Human Centered Design/Innovation: Organizational Development Projects for Strategy + Planning

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is anticipated to be \$100,000. Through this RFP, applicants may submit budget requests up to **\$100,000** for a service period of up to 12 months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. See Appendix D for more details. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Citywide

Target Population: OEWD staff (~130 individuals) and OEWD funded partners (nonprofit organizations, consultants and contractors)

Scope of Work:

OEWD is seeking proposals from both **nonprofit and for-profit organizations**.

OEWD is seeking proposals to support its organizational development as well as that of its partners, grantees and stakeholders through human-centered design/innovation.

The scope of work may include a variety of organizational development projects based on human-centered design methodology and emerging research in related fields of technology, futurism, complexity theory, strategic planning, and equity work.

Proposals will be considered for the following activities:

- **Communications strategy design:** Development of human/user-centered business processes to support OEWD stakeholder outreach, including regular and ongoing dissemination of information and stories to stakeholders through web and other online tools and media.
- **Stakeholder Facilitation:** Development of human-centered approaches facilitating greater collaboration and partnership among and between OEWD and internal and

external stakeholders. This may include direct stakeholder facilitation, or training OEWD staff.

- **Strategic Planning:** Services in this area may range from discreet work on select aspects of OEWD’s strategic planning process to responsibility for all aspects of planning, facilitation, design, and delivery of OEWD’s strategic plan, including stakeholder facilitation.

Proposals in this area may intersect with ongoing efforts at the Office of Economic and Workforce Development, including:

- Implementation of the OEWD Racial Equity Action Plan, which details OEWD’s key role and commitment to ensuring equitable and inclusive outcomes in San Francisco. This work may begin as soon as Spring 2021, and may continue through Fiscal Year 2023-2024. For more information, visit racialequitysf.org.
- Implementation of recommendations of San Francisco’s Economic Recovery Task Force. This work has begun and is expected to continue through Fiscal Year 2023-2024. For more information, visit <https://www.onesanfrancisco.org/covid-19-recovery>.

Minimum Qualifications:

- Applicant must be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco
- Experience training, consulting, and/or researching and developing human-centered design for business, government, education, non-profit, thought leadership, etc. with measurable positive results
- Experience using human-centered design to facilitate strategic planning for public and private sector organizations of similar complexity to OEWD and with measurable positive results on the planning, services, products, and/or organizational culture of these clients

Preferred Qualifications:

- Recognized leadership in human-centered design/innovation
- Demonstrated success applying human-centered design/innovation to organizational development for business, education, government, non-profit, organizational development, technology, product design, program development, etc.
- Fusion-based approaches: Experience fusing human centered design with complexity theory, emerging technology, futures-based thinking, and/or other current research in the field of design thinking
- Experience training, facilitating, coaching in the aforementioned fusion-based approaches with measurable positive results on clients’ organizational services, products, and/or culture

Supplementary Questions and Requirements:

Please address the following questions in your proposal narrative:

- How do you expect human-centered design to improve OEWD's strategic planning?
- How will you measure positive/successful outcomes of a strategic planning process?
- How will you measure successful introduction, integration, and development of human-centered design into OEWD operations, programs, projects, and services in the broader context of strategic planning?
- How does your proposal consider and respond to the realities of COVID-19?

Additionally, please submit all of the following as supplementary attachments to your proposal:

- Between 2 and 5 case studies from prior, similar projects, collaborations or contracts with public institutions
- 3 professional references from clients of prior, similar projects, collaborations or contracts, including email and phone contact information

Program Area EE: Human Centered Design/Innovation: Organizational Development Projects for Internal Training + Integration

Anticipated Number of Awards: 1-2

Amount: Total amount of funding available under this program area is anticipated to be \$50,000. Through this RFP, applicants may submit budget requests between **\$25,000 –\$50,000** for a service period of up to 12 months. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Because this program area is open to for-profit entities, contract awards may be subject to Chapter 14B requirements. See Appendix D for more details. A Local Business Enterprise (LBE) rating bonus of 10% will be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>

Eligible Neighborhood(s): Citywide

Target Population: OEWD staff (~130 individuals) and OEWD funded partners (nonprofit organizations, consultants and contractors)

Scope of Work:

OEWD is seeking proposals from both **nonprofit and for-profit organizations**.

OEWD is seeking proposals to support its organizational development as well as that of its partners, grantees and stakeholders through human-centered design/innovation.

The scope of work may include a variety of organizational development projects based on human-centered design methodology and emerging research in related fields of technology, futurism, complexity theory, strategic planning, and equity work.

Proposals will be considered for the following activities:

- Work with OEWD to develop and implement new internal structures for incorporating human-centered design/innovation methodologies throughout its operations.
- Provide human-centered design/innovation training and tools to support the professional growth and development of OEWD leadership and staff.

Proposals in this area may intersect with ongoing efforts at the Office of Economic and Workforce Development, including:

- Implementation of the OEWD Racial Equity Action Plan, which details OEWD’s key role and commitment to ensuring equitable and inclusive outcomes in San Francisco. This work may begin as soon as Spring 2021, and may continue through Fiscal Year 2023-2024. For more information, visit racialequitysf.org
- Implementation of recommendations of San Francisco’s Economic Recovery Task Force. This work has begun and is expected to continue through Fiscal Year 2023-2024. For more information, visit <https://www.onesanfrancisco.org/covid-19-recovery>

Minimum Qualifications:

- Applicant must be a fully established nonprofit or for-profit entity eligible to do business with the City and County of San Francisco
- Experience training, consulting, and/or researching and developing human-centered design for business, government, education, non-profit, etc. with measurable positive results
- Experience training organizations and staff in the proper use and execution of human-centered design in program and project settings with measurable positive results on organizational outcomes and internal culture

Preferred Qualifications:

- Recognized leadership in human-centered design/innovation
- Demonstrated success applying human-centered design/innovation to organizational development for business, education, government, non-profit, organizational development, technology, product design, program development, etc.
- Fusion-based approaches: Experience fusing human centered design with complexity theory, emerging technology, futures-based thinking, and/or other current research in the field of design thinking
- Experience training, facilitating, coaching in the aforementioned fusion-based approaches with measurable positive results on organizational services, products, and/or culture

Supplementary Questions and Requirements:

Please address the following question in your proposal narrative:

- How will you measure successful introduction, integration, and development of human-centered design into OEWD operations, programs, projects, services, and culture?
- How does your proposal consider and respond to the realities of COVID-19?

Additionally, please submit all of the following as supplementary attachments to your proposal:

- Two to five case studies from prior, similar projects, collaborations or contracts with public institutions
- Three professional references from clients of prior, similar projects, collaborations or contracts, including email and phone contact information

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Professional Services Contract for Research and Analytical Activities

Funding Source: Federal Grant

PSC Duration: 2 years

PSC Amount: \$750,000

1. Description of Work

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

Institute for the Future (ITFF) will partner with SFMTA on implementing a Federal Transit Administration (FTA)-funded grant project, National Transit Adaptation Strategy. Institute for the Future will develop a focused strategy to help identify mobility needs, target market segments, and develop messaging to rebuild confidence in public transportation to quickly drive up ridership that has been affected by the pandemic.

ITFF's specific work will include developing a futures report that evaluates a 10-year forecast for the public transportation industry in the United States. ITFF will identify candidate areas for potential exploration and narrow the focus to large-scale directions of change that are likely to reshape the broad operating environment in the coming decade for transit. ITFF will also work on developing specific customer profiles and personas of public transportation users. This process will lead to the development of specific messaging for target audiences that can be used in print and digital form, with the objective of building public confidence and loyalty in using transit.

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

The COVID-19 public health emergency has had a significant impact on transit operations nationwide. In response, the Federal Transit Administration announced a new FY 2020 Public Transportation COVID-19 Research Demonstration Grant Program in October 2020. Per the FTA, "the research and demonstration program will help evaluate, assess the efficacy, and promote promising innovative transit solutions that address challenges transit agencies are facing with the COVID-19 public health emergency". Working with its grant-identified partner, Institute for the Future, the SFMTA submitted its project, the National Transit Adaptation Strategy, and was approved for a grant award in January 2021. Denial of this service directly will result in the SFMTA not being able to carry out the FTA-grant-funded project. If the project is not implemented, the SFMTA will lose its award of FTA funds. Significantly, the SFMTA will not have the tools and knowledge regarding how to recover from the pandemic and rebuild confidence in public transit among its riders, affecting the SFMTA's financial health and the economy of the city/bay area. Also, as required by the FTA, the SFMTA will make information and tools from this project available for use by the transit industry. If this service is denied, transit agencies from around the country will not have the tools and insight gained from the implementation of the SFMTA's project to support them as they try to rebuild their transit ridership.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

N/A: This service has not been provided in the past.

D. Will the contract(s) be renewed?

The contract will be for 2 years, with which the SFMTA may extend at its sole discretion for additional 3 terms of 4 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.

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

Pursuant to FTA guidelines, the grant funds for this project must be spent within 2 years. As a short-term research project that addresses the negative impact of the COVID-19 pandemic on public transit, the SFMTA must implement this project quickly to make use of findings as to the recovery ramps up.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Success of this project entails working closely with SFMTA Management and Staff, including from Communications, Transit Operations, and Finance Divisions. Required skills and expertise include data analyses, collection and management; forecasting and modeling; research; and survey methods. Also, required knowledge of specific fields including public transit and transit options, economic conditions, and impact of fluctuations, research tools and methodologies, and marketing campaign best practices.

B. Which, if any, civil service class(es) normally perform(s) this work? 1312, Public Information Officer; 1314, Public Relations Officer; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the Institute for the Future will use its own tools and methodology for this work, including for data collection and analysis, and forecasting and modeling.

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

Not applicable. Current staff is fully engaged with existing work, and the duration of two years in FTA funds* is too short to hire new staff. *Per FTA grant guidance, the project should be completed within 24 months of the grant award.

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

A. Explain why civil service classes are not applicable.

Not applicable. Existing civil service classes could perform the required work; however, current staff at SFMTA are fully engaged with existing workloads and the duration of two years in FTA funds is too short to hire new staff.

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. Not applicable. Existing civil service classes could perform the 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. Not applicable because this is a research 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.
Yes. Pursuant to FTA grant guidelines, "FTA emphasizes that third-party procurement applies to all funding awards, as described in FTA Circular 4220.1F, "Third Party Contracting Guidance."

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 04/15/2021, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 South Van Ness, 6th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41937 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Thursday, April 15, 2021 8:52 PM
To: Nuque, Amy; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 41937 - 20/21

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

RECEIPT for Union Notification for PSC 41937 - 20/21 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 41937 - 20/21 for \$750,000 for Initial Request services for the period 05/01/2021 – 05/01/2023. 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/16239> 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 LIBRARY -- LIB

Dept. Code: LIB

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

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

Type of Service: Strategic Planning Consultant

Funding Source: Library Preservation Fund

PSC Amount: \$1,000,000

PSC Est. Start Date: 07/01/2021

PSC Est. End Date 06/30/2025

1. Description of Work

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

SFPL seeks a Contractor to develop a five-year strategic plan (Plan). The Contractor shall work with SFPL leadership, staff, and stakeholders to structure, draft, revise, and present a Plan informed by data and best practices and designed to inform collections, programming, services, and capital decisions for SFPL.

SFPL expects the development of the Plan would involve, at a minimum:

A. Outreach, communications, and engagement to hear the perspectives of SFPL leadership, staff, and internal/external stakeholders (communications plan, outreach and engagement strategy, mission and values audit, interviews/focus groups/workshops, written summaries of each engagement, surveys)

B. Qualitative and quantitative analysis (review of past efforts and existing documents, demographic analysis, best practice review, analysis of emerging resilience needs)

C. Strategic Plan documents (mission statement and core values with racial equity framework, goals, objectives, long-term strategies, continuous improvement toolkit, graphics, documentation of process and work)

D. Consistent, efficient project management (kick-off, work plan, regular meetings)

E. Presentation support (materials development, content delivery)

Please note that our scope of work does NOT include any legal work.

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

SFPL's current strategic plan sunsets at the end of FY2021, and the department needs to develop a new one to help prioritize and guide agency efforts for the next five years. Without this plan in place, it would be difficult to line up departmental resources, secure staff and stakeholder buy-in, and advance the organization in a coherent, organized way. The work to be delivered through this contract is instrumental to continue SFPL's service of the greatest public interest. It would not be possible for existing SFPL staff to deliver the scope of work needed – it is too far-reaching, too time-consuming, and too far outside the bounds of our workforce's domain. Successful creation of this Strategic Plan requires a neutral party to interact between staff and community. The consequence of denial therefore is that SFPL would need to operate with priorities established without a robust, transparent, community-grounded process. That outcome would not be in the best interests of SFPL's public and is unacceptable to the department's current leadership.

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 closest approximation to the work here scoped was developed by staff, and because of the limited hours and attention available, the resulting product has not served the department as well as desired. It also did not have the robust community outreach and engagement process called for in this scope of work, which is required for this type of work to be taken seriously in our community. That engagement is essential for SFPL to build trust and buy-in from staff and stakeholders so that the organization can deliver services for the greatest public good. As noted above, it

would not be possible for staff to deliver the work called for under this scope to meet the needs of the organization and the expectations of our current leadership.

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):

- 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:

A robust community outreach and engagement process conducted by a neutral party is called for in this scope of work, which is required for this type of work to be taken seriously in our community. That engagement is essential for SFPL to build trust and buy-in from staff and stakeholders so that the organization can deliver services for the greatest public good. It would not be possible for staff to deliver the work called for under this scope to meet the needs of the organization and the expectations of our current leadership.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: MQ1 Prime Proposer successfully delivered a minimum of at least three (3) similar plans or related engagements in the last five (5) years. At least one (1) of these similar plans must have been for a public sector client. Knowledge of the library industry and past work with library clients are desirable. MQ2 Prime Proposer’s Project Lead has a minimum of 10 years’ experience in the field of strategic planning or other similar organizational consulting, with extensive stakeholder engagement. The 10 years of experience required for Project Lead need not be with the same firm.

B. Which, if any, civil service class(es) normally perform(s) this work? 1803, Performance Analyst I; 1805, Performance Analyst II; 1830, Perf Analyst III Project Mgr;

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?

SFPL had been in conversation with the Controller’s Office about the possibility of CSA staff contributing to the effort. Given the continuing demands of responding to the pandemic and leading the City’s recovery, that team certainly does not have bandwidth to conduct this analysis. SFPL does not have internal staff who could deliver the work needed.

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

A. Explain why civil service classes are not applicable.

SFPL does not have internal staff who could deliver the work needed. Controller’s staff who might be able to contribute in normal times are not available for this work in the timeframe needed. Even if Controller’s staff were available, they would not be sufficient for the community outreach and engagement lift required to make this strategic planning engagement successful. Outside perspectives with expertise in community engagement are needed.

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 sporadic, intensive, time-sensitive work. It would not make sense to carry permanent staff to deliver this occasional product, nor can SFPL reasonably staff for the surge of resources needed to execute the deliverables called for.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No Training.
- 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 04/23/2021, 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: marcus lange Phone: 415-557-4214 Email: marcus.lange@sfpl.org

Address: 100 Larkin Street, room 680 San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40805 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of marcus.lange@sfpl.org
To: [Lange, Marcus \(LIB\); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Yoshida, Shirley \(LIB\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Lange, Marcus (LIB); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Yoshida, Shirley (LIB); DHR-PSCCoordinator, DHR (HRD)@sfpl.org)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40805 - 20/21
Date: Friday, April 23, 2021 2:50:05 PM

RECEIPT for Union Notification for PSC 40805 - 20/21 more than \$100k

The PUBLIC LIBRARY -- LIB has submitted a request for a Personal Services Contract (PSC) 40805 - 20/21 for \$1,000,000 for Initial Request services for the period 07/01/2021 – 06/30/2025. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/16361> 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 Sourcing Event ID 000005301

Formal Request for Proposals for: Strategic Planning and As-Needed Consulting

This Solicitation can be viewed under at City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>



Request for Proposals Issuance	April 23, 2021
Pre-Proposal Conference	May 12, 2021 at 10AM Pacific Time https://sfplorg.zoom.us/j/85732229752?pwd=djRVV0FUMEVrSExzM3NXKzBLMzladz09 Meeting ID: 857 3222 9752 Passcode: 136797 (See RFP Section I.2(F)(2) Proposal Format for dial in info)
Deadline for Questions	May 17, 2021 by 2PM Pacific Time
Deadline to Submit Proposals	May 28, 2021 by 2PM Pacific Time
Oral Interviews	June 9, 2021
Notice of Intent to Award	June 11, 2021
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.
Contract Administrator:	Marcus Lange Contract Manager, SFPL 100 Larkin St., Room 680, San Francisco 94102 Email: Marcus.Lange@sfpl.org

Solicitation Attachments:

Attachment 1: City’s Proposed Agreement Terms (P-600)

Attachment 2: Price Proposal Template

Attachment 3: Proposer Questionnaire

Attachment 4: Proposer Information and References

Attachment 5: First Source Hiring Form

Attachment 6: Health Care Accountability Ordinance & Minimum Compensation Ordinance Forms

Attachment 7: Reserved (Sweatfree Ordinance Form P-12U-C).

Attachment 8: Reserved (Sweatfree Ordinance Form P-12U-I).

Attachment 9: LBE Participation Requirements and Good Faith Outreach Forms

Solicitation Appendices:

Appendix A: SFPL Important Resources

Appendix B: Community Profile Presentation

Appendix C: Community Profile Citywide Overview

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I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “Solicitation”) is being issued by the San Francisco Public Library (“SFPL”). SFPL is seeking qualified suppliers (“Proposers”) to provide proposals for strategic planning, as-needed consulting, and facilitation services that are all designed to advance racial equity, inclusion, and diversity. (Proposal). SFPL shall order goods and/or services covered by the awarded contract through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract during the contract term.

SFPL is an independent agency of the City and County of San Francisco that operates twenty-seven (27) neighborhood libraries in addition to a main library in the city’s civic center. The libraries are open seven days a week and receive approximately six million annual visits. SFPL has consistently delivered exceptionally high levels of service to its patrons, receiving a grade of A- on the most recent San Francisco City Survey, and in 2018 it was named the Gale/Library Journal Library of the Year.

SFPL’s system is dedicated to free and equal access to information, knowledge, independent learning, and the joys of reading for our diverse community. The most recent SFPL Strategic Plan spanned 2016 to 2021 and articulated service excellence core values in support of this overall mission. That strategic plan can be found online here: <https://sfpl.org/uploads/files/pdfs/StrategicPlan2017-21.pdf> and its most recent strategic plan summary is available here: [StrategicPlanSum_FNL.pdf \(sfpl.org\)](#) .

SFPL also developed a facility master plan in 2001, which served as the basis for the Branch Library Improvement Program (BLIP) of capital investments. BLIP’s goals were to:

- Reduce seismic risk of the branch libraries and comply with the Americans with Disabilities Act.
- Replace leased facilities with City-owned buildings.
- Meet the needs of the new and evolving twenty-first-century model.
- Build a system-wide support service center for library collections and branch operations.

The BLIP campaign updated, revitalized, and preserved 24 of the 27 branches of the SFPL system. Sixteen historic branches were renovated, four leased facilities were replaced by city-owned buildings, three branches were replaced with new buildings, and the system’s first new branch in 40 years was constructed in Mission Bay.

More recently, SFPL has conducted a Branch Library Feasibility Study (2018) to consider service and capital possibilities for three branch libraries: Mission Branch Library, Chinatown Him Mark Lai Branch Library, and the Ocean View Branch Library. Having been recently completed or renewed, these buildings were not updated as part of BLIP. Two of the branches, Mission and Chinatown, are historic Carnegie Libraries built in the early 20th century, and both are slated for major renovation. For Ocean View Library, SFPL is planning for replacement with a new, larger building to better meet the needs of the surrounding communities. This Feasibility Study produced a set of guiding principles for work on these three branches:

- Libraries for the 21st Century
- Flexible and adaptable building designs
- Multifunctional community program areas

- Transparency and ease of wayfinding
- Preservation of historic Carnegie Libraries

Looking forward, SFPL requires a strategic plan that can be **readily used** to inform service-driven, equity-minded programming and capital investments for the next generation.

Committed to service excellence and equity, SFPL seeks a strategic plan that will propel San Francisco’s library system to meet the needs of tomorrow. More than repositories for free, accessible physical and digital materials including books, libraries are expected to serve as community centers for education, digital access, and civic engagement, and meet the diverse learning needs of the overlapping communities in which they operate. Libraries have become a communal “third place” for all generations, and an access point for technology and information. They are also expected to serve as climate resilience hubs to provide respite as needed from the rising hazards of heat and poor air quality. Across the country, library facilities are being transformed inside and out to be accessible, resilient, and flexible while serving diverse needs through innovative collections, ideas programs, services, and partnerships. As technology evolves, another goal that the library adapts to those changes while ensuring San Francisco residents’ technological literacy grows as the technological capabilities of our programs and devices do.

The City and County of San Francisco is experiencing unprecedented volatility as a result of the COVID-19 health emergency and associated economic disruption. Still the needs of San Francisco’s neighborhoods continue to evolve in the face of rapid cultural and technological change. The library system needs to adapt to these changes, acknowledging the needs of current and future residents, anticipating growth, and providing state of the art services that are inviting and responsive to patrons’ needs. The COVID-19 pandemic has accelerated a technological disruption in the library industry with greater adoption of digital collections, which presents a unique opportunity to reconsider the optimal use of social infrastructure to support recovery and resiliency.

2. Selection Overview

The City shall award a contract to the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the highest-ranking score.

B. Anticipated Contract Term

A contract awarded pursuant to this Solicitation shall be non-exclusive with an anticipated term of 2 years. The City at its sole, absolute discretion, shall have the option to extend the term for two (2) additional years for a total of four (4) years.

C. Anticipated Contract Not to Exceed Amount

A contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of **\$1,000,000** for the initial term. Should the contract be extended, the total NTE amount may proportionally increase as well.

D. Indefinite Quantity, As Needed Contract

A contract awarded pursuant to this Solicitation will result in a term, indefinite quantities, as-needed contract. There is no guarantee of a minimum amount of goods or services for any of the Proposers selected for contract negotiations or for the awarded Proposer(s). Unless otherwise specified herein, deliveries and services will be required in quantities and at times as ordered during the period of the contract. Estimated quantities, if any, stated in this Solicitation are approximations only. City, in its sole discretion, may purchase any greater or lesser quantity. City may also make purchases of items awarded pursuant to this Solicitation from other suppliers when City determines, in its sole discretion, that it is in the best interest of the City to do so.

E. Cooperative Agreement

Any other City department, public entity or non-profit made up of multiple public entities, may use this solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation.

F. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer’s control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee - is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

G. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other pertinent information posted in the City’s Supplier Portal.

Proposal Phase	Tentative Date
Request for Proposals Issued	April 23, 2021
Pre-Proposal Conference	May 12, 2021 at 10AM Pacific Time (See Meeting ID, Passcode, and Dial by your location info below)
Deadline for Written Questions	May 17, 2021 by 2PM Pacific Time
Deadline to Submit Proposals	May 28, 2021 by 2PM Pacific Time
Oral Interviews	June 9, 2021 at 10AM Pacific Time
Notice of Intent to Award	June 11, 2021
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.
Final Award	June 16, 2021

The Pre-Proposal Conference Details: The Pre-Proposal Conference will begin at 10AM Pacific Time on May 12, 2021 via Zoom.

<https://sfpl-org.zoom.us/j/85732229752?pwd=djRVV0FUMEVrSExzM3NXKzBLMzladz09>

Meeting ID: 857 3222 9752
Passcode: 136797

Dial by your location
+1 408 638 0968 US (San Jose)
+1 669 900 6833 US (San Jose)
+1 253 215 8782 US (Tacoma)
+1 346 248 7799 US (Houston)
+1 646 876 9923 US (New York)
+1 301 715 8592 US (Washington DC)
+1 312 626 6799 US (Chicago)
833 548 0276 US Toll-free

833 548 0282 US Toll-free
877 853 5247 US Toll-free
888 788 0099 US Toll-free
Meeting ID: 857 3222 9752

Find your local number: <https://sfpl-org.zoom.us/j/kdhFdDShbk>

Proposers' representatives are urged to arrive on time. Topics already covered will not be repeated for the benefit of late arrivals. **Failure to attend the Pre-Proposal Conference shall not excuse the awarded Proposer from any obligations of a contract awarded pursuant to this Solicitation.** Any change or addition to the requirements contained in this Solicitation as a result of the Pre-Proposal Conference will be executed by a written Addendum to this Solicitation. It is the responsibility of the Proposer to check for any Addendum to this Solicitation or other pertinent information posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>.

H. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

Step 1: Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

Step 2: Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Chapter 12(B) and 12(C) Inquiries:** For questions concerning the City's Chapter 12(B) and 12(C) Equal Benefits and Non-Discrimination in Contracting requirements, go to: www.sfgov.org/cmd.

I. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than the deadline for submission of written questions or requests for clarification.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at

least .5” on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. The maximum proposal response (excluding SFPL mandated Attachments) may not exceed 30 pages. Failure to follow formatting, submission, or content requirements, as well as the 30 page limit restriction, may negatively impact the evaluation of your Proposal.

3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must upload their complete Proposals into the City’s Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

Proposers are encouraged to upload their Proposals to the SF Supplier Portal as early as possible to address any technical issues that may arise during the submission process. In the event a Proposer is unable to upload its complete Proposal into the SF Supplier Portal, Proposer must email its Proposal to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation prior to the Proposal submission deadline and request confirmation of receipt. Proposer must include in its email: (a) documentation (e.g. screenshots) verifying its inability to upload its Proposal into the SF Supplier Portal and (b) a detailed justification explaining why it was not able to have the issue addressed prior to the submission deadline.

J. Proposal Selection

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

K. Contract Terms and Negotiations

The successful Proposer will be required to enter into an Agreement substantially in the form of the Agreement attached hereto as Attachment 1, “Proposed Agreement Terms”. If Proposer is unable to accept City’s Proposed Agreement Terms substantially in the form presented, Proposer shall include a revised copy of City’s Proposed Agreement with its Proposal. The revised copy of the Proposed Agreement must clearly:

- (1) Mark those section to which it objects;
- (2) Set forth Proposer’s alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the next highest ranking score.

L. Protest Procedures

1. Protest of Non-Responsiveness Determination

Within (3) three business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which

the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

2. Protest of Non-Responsible Determination

Within (3) three business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

Within (3) three business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

II. CITY'S SOCIAL POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social Policy Requirements"). These Social Policy Requirements can be found in Attachment 1, City's Proposed Agreement Terms. The Social Policy Requirements set forth below are NOT intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it. Proposers are encouraged to carefully review the Social Policy Requirements applicable to this Solicitation contained in Attachment 1, City's Proposed Agreement Terms.

A. Proposers Unable to do Business with the City

1. Generally

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City's Proposed Agreement Terms.

2. Administrative Code Chapter 12X

Subject to certain exceptions, Proposers are advised that this Solicitation is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into a contract with a Proposer that (a) has its headquarters in a state that has enacted a law that perpetuates discrimination against LGBT people and/or has enacted a law that prohibits abortion prior to the viability of the fetus, or (b) will perform any or all of the work on the contract in such a state. Chapter 12X requires the City Administrator to maintain a list of such states, defined as

“Covered States” under Administrative Code Sections 12X.2 and 12X.12. The list of Covered States is available on the website of the City Administrator (<https://sfgsa.org/chapter-12x-state-ban-list>). Proposers will be required to certify compliance with Chapter 12X as part of its Proposal, unless the City determines that a statutory exception applies. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

3. Administrative Code Chapter 12B

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Reserved (Prevailing Wage Ordinance).

C. Health Care Accountability Ordinance

A Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each Covered Employee, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

D. Minimum Compensation Ordinance

A Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco>. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation..*

E. First Source Hiring Program

A Proposer selected pursuant to this Solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this Agreement and an awarded Proposer is subject to the enforcement and penalty provisions

in Chapter 83. Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.

F. LBE Rating Bonus and Bid Discounts

Pursuant to Chapter 14B Local Business Enterprise (LBE) Program, rating bonuses or bid discounts, as the case may be, shall apply to the procurement of the goods or services, as applicable, being procured through this Solicitation in the manner described below. **The rating bonus or bid discount, as the case may be, apply at each phase of the selection process.**

1. Rating Bonus/Bid Discount for General and Professional Services

Estimated Contract Value	Small/Micro LBEs Rating Bonus	SBA LBEs Rating Bonus
Greater than \$10,000 but less than or equal to \$400,000	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer or a JV with LBE participation.</i>
Greater than \$10,000,000 but less than or equal to \$20,000,000.	2%	2%

2. Rating Bonus/Bid Discount for General and Professional Services by Joint Ventures

Estimated Contract Value	Small/Micro LBE Participation Level	Rating Bonus
Greater than \$10,000 but less than or equal to \$10,000,000.	Equals or exceeds 35%, but less than 40%	5%
	Equals or exceeds 40%, but less than 100%	7.5%
	100%	10%

If applying for an LBE rating discount as a Joint Venture (JV), the Micro and /or Small-LBE must be an active partner in the JV and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the Proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the JV. The portion of the Micro and/or Small-LBE JV's work shall be set forth in detail separately from the work to be performed by the non-LBE JV. The Micro and/or Small-LBE JV's portion of the contract must be assigned a commercially useful function.

3. Rating Bonus/Bid Discount for Commodities

Estimated Contract Value	Small/Micro LBEs Rating Bonus	SBA LBEs Rating Bonus
Greater than \$10,000 but less than or equal to \$400,000	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE</i>

		<i>Proposer or a JV with LBE participation.</i>
Greater than \$10,000,000.	0%	0%

G. LBE Subcontracting Requirements and Good Faith Outreach

The LBE Subcontracting Participation Requirement and Good Faith Outreach requirements of Chapter 14B of the San Francisco Administrative Code shall apply to this Solicitation.

1. LBE Subcontracting Participation Requirements

The LBE Subcontracting Participation Requirements for this Solicitation is **20%** of the final contract value. Subcontracting Participation Requirements can only be met with CMD-certified Small or Micro-LBEs located in San Francisco, a list of which can be found here: http://mission.sfgov.org/hrc_certification/.

2. LBE Good Faith Outreach

Each Proposer shall undertake adequate good faith outreach to LBE subcontractors and demonstrate the efforts on CMD Form 2B (see below) and supporting documents. Proposer must obtain at least 80 points in order to achieve adequate good faith outreach. *If the proposed LBE subcontracting participation exceeds the LBE Subcontracting Participation Requirement by at least 35%, the Proposer is excused from conducting or documenting its good faith efforts.*

3. LBE Participation Requirements and Good Faith Outreach Forms

All response packages submitted must include the following LBE Participation Requirements and Good Faith Outreach Forms which can be found in Attachment 9 LBE Participation Requirements and Good Faith Outreach Forms to this Solicitation:

- (a) CMD Form 2A: LBE Participation Form
- (b) CMD Form 2B: Good Faith Outreach Form
- (c) CMD Form 4: Joint Venture Form (if applicable)
- (d) CMD Form 5: Employment Form

Failure to complete, sign and submit each of the required LBE Participation Requirements and Good Faith Outreach Forms may result in the response package being deemed non-responsive and rejected.

4. CMD Compliance Officer

The CMD Compliance Officer (CCO) for this project is:

Dalmar Ismail
 Contract Monitoring Division
 City and County of San Francisco
 Tel: 415.581.2322
 Email: dalmar.ismail@sfgov.org
 Website: www.sfgov.org/cmd.

5. LBE Payment and Utilization Tracking

An awarded Proposer shall pay LBE subcontractors within three business days as provided under Chapter 14B.7(H)(9). Within ten business days of City’s payment of an invoice, the awarded

Proposer shall confirm that all subcontractors have been paid in the Payment Module of the City's Supplier Portal unless instructed otherwise by CMD. Failure to submit all required payment information to the City's Financial System with each payment request may result in the withholding of 20% of the payment due. Self-Service Training is located at this link: <https://sfcitypartnersfgov.org/pages/training.aspx>.

H. Reserved (Sweatfree Procurement).

III. GOODS AND SERVICES REQUESTED

A. Services Requested (Scope of Work)

(i) General Description of Services

- A. SFPL seeks a Contractor to develop a five-year strategic plan (Plan). The Contractor shall work with SFPL leadership, staff, and stakeholders to structure, draft, revise, and present a Plan informed by data and best practices and designed to inform collections, programming, services, and capital decisions for SFPL.

SFPL expects the development of the Plan would involve, at a minimum:

- a. Outreach, communications, and engagement to hear the perspectives of SFPL leadership, staff, and internal/external stakeholders
 - b. Qualitative and quantitative analysis
 - c. Strategic Plan documents
 - d. Consistent, efficient project management
 - e. Presentation support
- B. SFPL seeks a Contractor to provide As-Needed facilitation, training, and outreach services in furtherance of the Plan.
- a. As-Needed Training and Facilitation
 - i. Provide facilitation to SFPL staff working to build equitable practices in line with the Plan.
 - ii. Plan and facilitate up to 80 hours of workshops/discussions with SFPL staff.
 - b. As-Needed Outreach
 - i. Provide outreach and communications assistance to SFPL staff for current and potential SFPL patrons.

(ii) Deliverables

A. Outreach, Communications, and Engagement

For the Plan to be a useful document for its life cycle, meaningful and productive engagement with SFPL leadership, staff, and stakeholders to understand ambitions, needs, and desired outcomes will be essential. These efforts should engage participants in all eleven (11) San Francisco Supervisorial Districts and include, at a minimum:

- a. Development of a communications plan
- b. Development of an outreach and engagement strategy including incentivizing

- tactics to encourage turnout and opinion-giving from diverse populations
- c. Mission and values audit for SFPL leadership and staff
- d. Interviews, focus groups, and/or workshops to hear perspectives from SFPL leadership, staff, and stakeholders on needs for collections, programs, services, and partnerships in the SFPL system
- e. A written summary of each engagement, including methodology, findings and general themes
- f. Surveys and/or other perspective-gathering tools that do not require in-person participation
- g. A written analytical summary of data gathered through activities in (f)
- h. Updates to participants on the Plan's development and publication

Proposers should expect to engage the following stakeholders as part of the development of the Plan. This is not a complete list but is representative of the organizations and individuals that will contribute to this process:

Community and non-Government Stakeholders

1. Residents of the city of San Francisco, including patrons and non-patrons of SFPL, from each of San Francisco's 11 Supervisorial Districts
2. San Francisco Public Library Commission
3. San Francisco Council of Neighborhood Libraries
4. Friends of the San Francisco Public Library
5. San Francisco Unified School District

San Francisco City Government Stakeholders

1. San Francisco Public Library staff
2. San Francisco Planning Department
3. San Francisco Department of the Environment
4. San Francisco Department of Emergency Management
5. San Francisco Office of Resilience and Capital Planning
6. San Francisco Homelessness and Supportive Housing
7. San Francisco Office of Racial Equity
8. San Francisco Human Services Agency
9. San Francisco Department of Public Health
10. San Francisco Mayor's Office of Housing and Community Development
11. San Francisco Office of Civic Engagement and Immigrant Affairs
12. San Francisco Controller's Office
13. San Francisco Treasurer/Tax Collector
14. San Francisco Assessor's Office

B. Analysis

SFPL is a data-driven organization. The Research, Strategy & Analytics and Collections & Technical Services Divisions maintain a substantial amount of data and information to be analyzed and synthesized for the Plan's development. It is the responsibility of the

Consultant to seek and obtain all underlying data necessary to complete this requirement. SFPL will assist with providing data for analysis expected to include, at a minimum:

- a. Review of relevant past efforts and related documents
- b. Demographic analysis of current SFPL usage and projections for the next five years, with an emphasis on racial equity and community trends
- c. Best and leading practices from peer libraries and industry organizations for library services
- d. Analysis of San Francisco's emerging resilience needs as documented in the Hazards and Climate Resilience Plan and Climate Action Plan

C. Plan Documents

The Plan itself should include, at a minimum:

- a. Mission statement and core values, with a racial equity framework for the Plan as a whole (e.g., Equity Zones)
- b. Organization-wide five-year goals, goal-aligned annual priorities for each of the first two years, and a recommended process for updating those priorities on an annual basis
- c. Community-focused objectives for collections, programming, services, and partnership for each SFPL library district and the Main
- d. Feasible recommended strategies for SFPL to prepare for long-term future demand, including consideration of resilience needs such as technology infrastructure and equipment, HVAC systems and controls, and green buildings, as well as strategic locations for growth
- e. Toolkit for continuous organizational improvement and cadence for updates
- f. High-quality graphics, tables, narrative, and overall visual production for delivery to elected officials and SFPL leadership, staff, and stakeholders
- g. Appendix documenting the Plan development process and engagement efforts
- h. Appendix documenting results of any surveys and/or other data-gathering
- i. Appendix documenting best practices research
- j. Twenty-five (25) full-color, bound copies of the final Plan and all data files and electronic copies of the Plan documents to SFPL

Draft versions of all Plan documents should be submitted to SFPL with adequate time for two rounds of review and editing.

D. Project Management

To deliver the Plan successfully and efficiently, hands-on project management is expected, to include, at a minimum:

- a. Clearly defined project manager and project team structure
- b. Stakeholder kick-off
- c. Understanding strategic planning goals and context
- d. Development and validation of a detailed work plan with milestones for all deliverables
- e. Regular project team meetings

- f. Documentation of process, engagement efforts, and deliverable development

E. Presentation

Proposers should be prepared to support SFPL in presentations regarding the Plan’s development and content. The support should include materials development and content delivery for at least one interim and one final presentation to audiences of SFPL leadership, staff, and the Library Commission. Content may be made publicly available on the SFPL website or other City of San Francisco websites.

- B. Reserved (Regulatory and Compliance Requirements Specific to the Services Solicited).**
- C. Reserved (Articles Furnished).**
- D. Reserved (Alternates).**
- E. Reserved (Samples).**
- F. Reserved (Freight on Board).**
- G. Green Purchasing Requirements**

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City [Mandatory Green Purchasing Requirements](#) to ensure all goods and services offered to City in response to this Solicitation comply with the City’s Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City’s Proposed Agreement Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

IV. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	10 Points
Written Proposal	65 Points
Oral Interviews	25 Points
TOTAL POINTS	100

Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined in the table above, each of which is addressed in more detail herein. If applicable, a CMD Contract Compliance Officer will assess Proposal compliance with LBE requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on. Award shall be made to the Proposer with the highest Total Points.

V. REQUIRED SUPPORTING DOCUMENTATION

Proposers must provide each Required Supporting Documentation (“RSD”) identified below with their Proposal. Failure to do so may result in the Proposal being deemed Non Responsive.

RSD1	Evidence that Proposer is 12B compliant or likely to become compliant within 30 days.
RSD2	<p>Completed Proposal Attachments:</p> <ul style="list-style-type: none"> <input type="checkbox"/> San Francisco Business Tax Certificate or evidence of exemption <input type="checkbox"/> Signed copy of all Proposal Addenda (If applicable) <input type="checkbox"/> Attachment 1: City’s Proposed Agreement Terms Marked to with Proposer’s Proposed Changes <input type="checkbox"/> Attachment 2: Price Proposal Template <input type="checkbox"/> Attachment 3: Proposer Questionnaire <input type="checkbox"/> Attachment 4: Proposer Information and References <input type="checkbox"/> Attachment 5: First Source Hiring Form <input type="checkbox"/> Attachment 6: Health Care Accountability Ordinance & Minimum Compensation Ordinance Forms <p><i>Attachment 7: Reserved (Sweatfree Ordinance Form P-12U-C).</i> <i>Attachment 8: Reserved (Sweatfree Ordinance Form P-12U-I).</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Attachment 9: LBE Participation Requirements and Good Faith Outreach Forms
RSD3	<p>Non Profit Entities: If a Proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the Proposer must comply with Chapter 12L and include in its Proposal:</p> <p>(1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to Proposer’s meetings and records, and</p> <p>(2) a summary and disposition of all complaints concerning the Proposer’s compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p> <p><i>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer’s Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent Agreement reached on the basis of the Proposal.</i></p>

VI. MINIMUM QUALIFICATIONS DOCUMENTATION (PASS/FAIL)

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc.... to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description	Verification Documentation
MQ1	Prime Proposer successfully delivered a minimum of at least three (3) similar plans or related engagements in the last five (5) years.	Attachment 4 – Proposer Information and References, Part II

	At least one (1) of these similar plans must have been for a public sector client.	
MQ2	Prime Proposer’s Project Lead has a minimum of 10 years’ experience in the field of strategic planning or other similar organizational consulting, with extensive stakeholder engagement. The 10 years of experience required for Project Lead need not be with the same firm.	Proposal Response for RFP Section VIII(B)

VII. PRICE PROPOSAL

A. Price Proposal Format

The Price Proposal Template associated with this Solicitation is attached hereto as Attachment 2. Include a completed Attachment 2 Price Proposal Template with your Proposal, following all instructions set forth therein. Attachment 2 Price Proposal Template, Sheet 1 “Total Cost – Deliverables” will evaluate the total Invoiceable Amount from Tasks 1-5. You must also complete Attachment 2 Price Proposal Template, Sheet 2 “As-Needed Hourly Rates” with your submission, but this will not impact your Evaluated Price Proposal total point allocation. The points allocated to the Proposed Price shall be determined by as follows:

Points	Evaluated Price Proposal
10	Less than or equal to \$850,000
8	Greater than \$850,000 but less than or equal to \$900,000
3	Greater than \$900,000 but less than or equal to \$1,000,000
0	Greater than \$1,000,000

B. Price Proposal Evaluation Period

The City will attempt to evaluate Proposals within thirty (30) days after receipt of Proposals. If City requires additional evaluation time, all Proposers will be notified in writing of the new expected award date.

C. Price Discrepancies

Where applicable, if there is a discrepancy between the Price Proposal and pricing entered by Proposer into the Supplier Portal, the Price Proposal pricing will prevail. In the event of a discrepancy between the unit price and the extended price, the unit price will prevail.

D. Price Lists

If a Price Proposal is based on prices from a catalog or price list, Proposer shall furnish copies of the catalog or price list in electronic format. Proposer shall furnish additional price lists as required. Proposer’s pricing narrative, including any proposed price list discounts or markups, must remain firm during the term of the contract.

E. Proposing on Separate Items or in Aggregate(s)

Single Aggregate: This Solicitation will result in the evaluation and award of one Aggregate consisting of one or more lines on the Price Proposal Template. The proposed price for each line on the Price Proposal Template shall equal the proposed estimated quantity multiplied by the proposed unit price. The proposed price for the Aggregate shall equal the total cost of all line items within that Aggregate and shall be evaluated against other Price Proposals, after being reduced by any applicable LBE discounts, Local Tax discounts and/or Prompt Payment discounts.

F. Application of Discounts for Evaluating Lowest Responsive Proposer

1. LBE Bid Discount/Rating Bonus

Proposer’s price shall be reduced by an amount equal to the applicable LBE Bid Discounts/Rating Bonus. The discount shall be applied solely for the purpose of determining the lowest responsive Proposer and shall be in addition to any other discounts, preferences, or adjustments required by City law.

2. Prompt Payment Discounts

Prompt Payment discount (discount for prompt payment) will not be taken into consideration in determining the Lowest Responsive Proposal.

3. Reserved (Anticipated Local Tax Revenue (Admin Code Section 21.32) Discount).

4. Sample Discount Calculation

Evaluations are performed on a pre-tax basis except in rare instances, where tax may be a factor (i.e. One vendor bundles the commodities and services in such a way that the entire amount must be taxed, while another vendor clearly separates commodities and services). Below is an example of how bid discounts and/or rating bonuses are applied to a Price Proposal for commodities and services.

ABC Firm Price Proposal Attributes	Offered Price Proposal (Pre Tax)	14B LBE Bid Discount (10%)	Prompt Payment Terms Discount (2% Max)	21.32 Local Tax Revenue Discount (1.25%)	Evaluated Price when determining Lowest Responsive Proposed Price
<ul style="list-style-type: none"> • Certified Small or Micro LBE • SF Presence as defined by Admin Code 21.32 • Offering 4%/30 Net31 Prompt Payment Discount 					
Commodities	\$2,000	(\$200)	(\$40)	(\$25)	\$1,735
Services	\$1,000	(\$100)	(\$20)	N/A to Services	\$880
Total	\$3,000	(\$300)	(\$60)	(\$25)	\$2,615

VIII. WRITTEN PROPOSAL (65 POINTS)

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below. Your **Written Proposal may not exceed 30 pages** (See RFP Section I.2(F)(2) Proposal Format above). *The content of all Proposals must consist of the information specified below, in the order outlined below, in order to be deemed responsive.*

A. Business Profile (5 Points)

Provide a brief description of the Proposer’s size and organization structure, and include a listing and description of any lawsuit resulting from (a) any project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years. If none, note that neither the Proposer nor any of its subcontractors have any such projects. Proposers should attest in their Business Profile whether or not the Project Team has availability to commence work as of the contract start date, anticipated in July 2021.

B. Project Team (10 Points)

Provide the following information for Proposer's Project Team.

1. Team Members Narrative

Provide the role, responsibilities, qualifications, and company affiliation of every individual on the Proposer team who will perform the services outlined in this Solicitation. Discuss each team member's background and experience in order to demonstrate a strong ability to successfully perform the work.

2. Resumes of Key Team Members

Identify and provide resumes for all staff who will serve as the Key Team Members so that the Evaluation Panel can evaluate the ability of each team member to successfully fulfill their project roles and complete the scope of services.

3. Team Organization Chart

Attach an Organizational Chart that illustrates the team structure (include the integration/interaction with City project team staff). Note the Proposer name and title/role for each team member.

C. Qualifications Summary (10 Points)

Proposer must demonstrate corporate qualifications, commitment, strength, and technical capabilities to fulfill all services specified and required to successfully accomplish the work. If Proposer is a JV, include a description of the organization, relationships, and defined responsibilities of all Partners in the JV. Describe any previous project-specific associations of the JV Partners. The Lead JV Partner shall demonstrate proven experience in managing and leading.

D. Past Projects (15 Points)

Proposer must describe three (3) projects previously managed by the Proposer or, if applicable, JV Partners within the last 10 years. Past work with library clients is highly desirable. (up to 3 points per project up to 9 points; up to an additional 6 points assigned if at least one project is with an urban public library client)

- 1. Similar Size and Scope:** Each project must be of the type and scope of services specified in this Solicitation.
- 2. Project Details:** The descriptions shall include each item listed below.
 - a. Project name;
 - b. Project scope summary;
 - c. Dates when the project was performed;
 - d. Project costs;
 - e. Proposer's role and responsibilities in the project;
 - f. Proposer's performance on delivering the project on schedule and on budget;
 - g. Proposer staff members who worked on the project; and
 - h. Client name, reference, and contact info.

E. Work Approach (25 Points)

Proposer must describe their overall work approach to successfully deliver the Scope of Work for this Solicitation, by addressing each item listed below:

1. Quality and appeal of approach for delivering all work activities, including coordination

- and communication with Library staff, to meet project milestones and deliverable due dates within budget. (15 Points)
2. Understanding of potential project/task issues and constraints and approach to encouraging diverse, robust participation, including participation from disadvantaged and traditionally hard-to-reach communities. (5 Points)
 3. Approach and procedures for contending with the public in adversarial or difficult situations while producing high-quality deliverables. (5 Points)

IX. ORAL INTERVIEWS (25 POINTS)

The Evaluation Panel will hold oral interviews with the three (3) highest-scoring Proposers that have met the Minimum Qualifications, if applicable. Following the evaluation of the written proposals and price proposals, both scores will then be tabulated and proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the proposer receiving the second highest score, and so on. If necessary, the **three (3) proposers receiving the highest scores** will be invited to an oral interview.

Prior to oral interviews, the City will send a letter to each invited Proposer regarding the format and general rules of the interview. The City reserves the right to limit participation in the panel interviews to Proposers' key/lead team members and to exclude, for example, sub-consultants on multiple teams. The interview evaluation process may include (and be scored based on) a presentation by the Proposer and/or interview questions from the Evaluation Panel. Those questions may include and be related to Proposers' and key/lead team members' qualifications, their work approach, project task descriptions, team organization, and any questions which seek to clarify Proposal components. Proposers may also be scored on follow-up questions if clarification of Proposer's responses is necessary. The same set of interview questions will be used for all Proposers and shall be presented to Proposers at least one week prior to the date of interview to allow Proposers sufficient time to prepare their responses. The Evaluation Panel may ask follow-up questions if clarification of Proposer's responses is necessary. The Evaluation Panel will proceed to evaluate each Proposer based on each Proposer's presentation and responses.

X. INSURANCE AND BONDS

A. Insurance

Prior to award, the successful Proposer(s) will be required to furnish evidence of insurance as outlined in Attachment 1, City's Proposed Agreement Terms.

B. Reserved (Performance Bond).

C. Reserved (Fidelity Bond).

D. Failure to Provide Insurance and/or Bonds

Unless otherwise stated, within ten business days of the receipt of a notice of award, the Proposer to whom the contract is awarded shall deliver the required bond documents and/or specified insurance certificates to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice from Purchasing, Purchasing may, at its option, determine that this Proposer has abandoned its Proposal. Thereupon the tentative award of said contract to this Proposer shall be canceled and City shall notify the Proposer's surety and collect on the Proposer's bond (or the check accompanying its Proposal shall be deposited with the Treasurer of the City and County of San Francisco for collection) and the proceeds thereof shall be retained by City as partial liquidated damages for failure of such Proposer to properly file

the bonds and insurance herein required. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

XI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. Solicitation Errors and Omissions

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

B. Objections to Solicitation Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

C. Solicitation Addenda

The City may modify this Solicitation, prior to the Proposal due date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Solicitation Addenda issued by the City prior to the Proposal due date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal due date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

D. Proposal Term

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

E. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal due date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal deadline for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

F. Proposal Errors and Omissions

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

G. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

H. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code. Local law prohibits City elected officials from soliciting or accepting contributions from any person or entity seeking to enter into a contract or grant worth \$100,000 or more with the City, if the contract or grant requires their approval or the approval of their appointees to the board of a state agency. This restriction applies to the party seeking the contract or grant, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

A person or entity that contracts with the City may not make a campaign contribution to an elected official if the contract would require approval by that official, a board on which the official serves, or a board of a state agency on which an appointee of the official sits. The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded or no grant is approved; or (2) twelve months have elapsed since the award of the contract or approval of the grant.

A violation of Section 1.126 may result in the criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at [415-252-3100](tel:415-252-3100).

I. Reservations of Rights by the City

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;

5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

J. No Waiver

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

K. Other

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a. Any condition set forth in this Solicitation;
- b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c. Delivery time(s)..

2. City reserves the right to inspect an awarded Proposer's place of business prior award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

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: Algaecide application in local water storage reservoirs

Funding Source: Operating funds 25940-232422-10000-1002999

PSC Duration: 5 years

PSC Amount: \$500,000

1. Description of Work

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

Contractor will be required to assist the SFPUC with the application of the sodium carbonate peroxyhydrate and hydrogen dioxide in local source water reservoirs, including but not limited to Calaveras, San Antonio Reservoir, Crystal Springs, Pilarcitos and San Andreas Reservoirs.

The Contractor is expected to provide all labor, technical advice, written pest control recommendations, watercraft, precision application inductor systems and GPS tracking equipment for the specified reservoir treatment at the application rate as specified by the SFPUC. The Contractor shall document the aquatic algaecide treatment through the use of GPS data collection equipment to record the path of the treatment boats across the treatment areas within the specified reservoir.

Treatments, once started, shall be fully completed prior to the Contractor demobilizing from the site and shall be performed on a 24-hour per day, 7-day per week basis.

In addition to the actual algaecide application, the services that shall accompany each treatment are as follows:

All work performed by Contractor must conform to and comply with the requirements of all applicable permits, licenses and environmental mitigation requirements developed under the California Environmental Quality Act.

A pre-treatment inspection shall be conducted by the Consultant, which shall include a survey of the reservoir to be treated to ensure an accurate assessment of the treatment area conditions. A post-treatment report shall be prepared by the Consultant and submitted to the SFPUC presenting a summary of the treatment within 15 working days following each treatment.

This report shall contain a written description of the work performed, a listing of the licensed applicators and other staff who performed the work, equipment used and the treatment methodology.

The post-treatment report shall also contain the GPS treatment data, in digital format, collected during the treatment. The treatment area shall be downloaded into ArcView 9.1 software and overlaid onto an existing aerial photo of the specified reservoir for documentation and regulatory reporting requirements.

The SFPUC will provide the following:

The required amount of algaecide, any water discharge permit modifications and notifications required for application and any surface water quality monitoring associated with the algaecide application that may be required by water discharge permits, if any.

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

Management of algal problems in drinking water source supplies is necessary to meet public health and aesthetic standards, drinking water demand as well as limit distribution system issues. Algae blooms in local water reservoirs used in the treatment of drinking water can cause taste and odor issues, also in the treatment process it can cause filter clogging that can decrease the output of treated water and the potential to not meet the daily demand for drinking water in the Local and Regional Water System.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

Yes, we had a previous contract CS-238 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.

N/A

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:

Algae blooms can occur at times when we are at a high rate of use from local reservoirs, they can occur very quickly and have the potential to disrupt the supply of drinking water. It is very critical to treat the blooms in timely manner and having a contract in place to quickly address the treatment is needed to meet the daily demand of drinking water.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: This requires boats and equipment set up for the application process, GPS tracking devices, expertise, training and staff certfide in the use of the pesticide and the application of pesticides in waters. Knowlegde of state and local regulations and compliance with all applicable requirements in pesticide applications into water reservoirs.

B. Which, if any, civil service class(es) normally perform(s) this work? 3424, Integrated Pest Mgmt Specialist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, they will provide their own boats and equipmetn with special set ups to apply the pesticide, GPS tracking equipment to monitor and track the application, and equipment such as chemical pumps and such specific for the pesticides used is all owned and provided by the contractor.

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

We are starting conversations at our department to look into what it would take for us to perform this work in house, is it cost effective and what resources will we need to budget for.

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

A. Explain why civil service classes are not applicable.

The city at this time does not have the required training or certifications for this type of work and we do not have the equipment needed to apply pesticides in reservoirs.

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. Current class(es) could perform this work with additional necessary certifications and training if the city also possessed the equipment and technical expertise required to do the work. Staff is currently considering options to identify both the budget and resources necessary to bring the work in-house, but as of yet, no specific timelines or classes have been identified to do the 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. We will have city staff observe and participate in the application by the contractor to identify future needs to perform this work in house.

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. CS-238 which expires on 4/30/2021, file too large to download

7. Union Notification: On 04/27/2021, the Department notified the following employee organizations of this PSC/RFP request:

Laborers, Local 261

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

Name: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43923 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfgwater.org
To: Hale, Shawndrea M.; laborers261@gmail.com; [Hale, Shawndrea M.; DHR-PSCCoordinator, DHR \(HRD\)](mailto:Hale, Shawndrea M.; DHR-PSCCoordinator, DHR (HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 43923 - 20/21
Date: Tuesday, April 27, 2021 10:10:03 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

RECEIPT for Union Notification for PSC 43923 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 43923 - 20/21 for \$500,000 for Initial Request services for the period 07/01/2021 – 06/30/2026. 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/16394> 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: Professional Service

Funding Source: Water: Authority 10026501-0001

PSC Duration: 5 years

PSC Amount: \$300,000

1. Description of Work

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

There are two main components of proposed work: third-party verification of SFPUC's green bonds and development of SFPUC's green bond program. Third party verification must come from a verifier who has been approved by the Climate Bonds Initiative. The verifier requests data from before and after bonds are issued, reviews the data and issues verification reports that confirm that projects funded by green bonds are eligible for green bond certification. This process goes on throughout the entire duration of outstanding bond debt, up to 30 years.

Development of the green bond program includes activities that support the rapid growth of the green bonds market, consistent with global best practices. Aligned activities include, but is not limited to, publishing an annual green bond report directly onto SFPUC's investor relations page, implementing strategies to broaden SFPUC's investor base by attracting climate-aligned investors, and improving systems and protocols to streamline the green bond certification and reporting process both internal at the SFPUC and externally amongst the family of San Francisco agencies. For example, SFPUC has historically contracted with a consultant to support the publication of this annual report and these funds would be used to continue that work as well as make that support available to other city agencies who wish to pursue green bonds. Additionally, the SFPUC is initiating a pilot program to develop a Climate Aligned Capital Planning methodology and would use these funds to get support from Universities and other consultants. Each contract would follow standard contracting protocols.

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

Since 2015, the SFPUC has issued more than \$2 billion in green bonds. In 2018, the SFPUC signed the Green Bond Pledge, which is a joint initiative developed and designed by international climate finance and environmental groups including among others the Climate Bonds Initiative, California Governor's Office, and the California Treasurer's Office. The pledge commits the SFPUC to issuing bonds for infrastructure as green bonds, whenever applicable, consistent with global best practices. To fulfill this commitment, the SFPUC adheres to the International Capital Market Association's Green Bond Principles, which require the engagement of third-party verifiers to confirm that projects funded by green bonds are, indeed, aligned with the Climate Bonds Initiative's required criteria for the use of bond proceeds. In addition, the SFPUC is committed to publishing annually a project spending and management of proceeds report for each green bond issued throughout project construction. Currently, the SFPUC has 8 different certified green bonds outstanding and will not retire for several years. Failure to fulfill requirements of ongoing third-party verification and annual reports will result in the revocation of green bond certification and thus will violate the commitments included in the Green Bond Pledge. Ultimately, that may reduce our investor base which could increase our cost to borrow and contribute to rate increases.

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 through limited sub-contracts (Contract ID: 1000000320)

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 SFPUC issues green bonds which have maturities for several years. As the PSC includes scopes of work intended to support the SFPUC green bond program, the PSC will need to be renewed.

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.

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:

Third party verification must come from a verifier who has been approved by the Climate Bonds Initiative. The verifier requests data from before and after bonds are issued, reviews the data and issues verification reports that confirm that projects funded by green bonds are eligible for green bond certification. This process goes on throughout the entire duration of outstanding bond debt, up to 30 years. Development of the green bond program includes activities that support the rapid growth of the green bonds market, consistent with global best practices. Aligned activities include, but is not limited to, publishing an annual green bond report directly onto SFPUC's investor relations page, implementing strategies to broaden SFPUC's investor base by attracting climate-aligned investors, and improving systems and protocols to streamline the green bond certification and reporting process both internal at the SFPUC and externally amongst the family of San Francisco agencies. For example, SFPUC has historically contracted with a consultant to support the publication of this annual report and these funds would be used to continue that work as well as make that support available to other city agencies who wish to pursue green bonds. Additionally, the SFPUC is initiating a pilot program to develop a Climate Aligned Capital Planning methodology and would use these funds to get support from Universities and other consultants. Each contract would follow standard contracting protocols.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Third party verifiers have expertise in approving that the use of proceeds for green bonds are aligned with the Climate Bonds Initiative (CBI). Only CBI is able to approve third party verifiers. Consultants to support publication of green bond reports must have expertise in and understanding of the latest best practices for green bond reports.

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?

N/A

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

A. Explain why civil service classes are not applicable.

Third party verification, by its nature, cannot be conducted internally at the SFPUC. Green Bonds are a nascent field and subsequently requires specific expertise that is not yet developed by civil service staff.

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, because third party verification, by its nature, cannot be conducted internally at the SFPUC.

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, because third party verification, by its nature, cannot be conducted internally at the SFPUC.

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 04/27/2021, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sflower.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45411 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); cmoyer@nccrc.org; [Frigault, Noah \(HRC\)](mailto:Frigault, Noah (HRC)); sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DEM\)](mailto:Emanuel, Rachel (DEM)); laborers261@gmail.com; [Laxamana, Junko \(BOS\)](mailto: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@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; 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; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator, DHR (HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 45411 - 20/21
Date: Tuesday, April 27, 2021 11:20:54 AM

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RECEIPT for Union Notification for PSC 45411 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 45411 - 20/21 for \$300,000 for Initial Request services for the period 06/06/2021 – 06/05/2026. 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/16395> 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: Dive team inspections and cleanings of raw water and treated water facilities(PRO.0156)

Funding Source: Water Enterprise Operating Budget

PSC Duration: 5 years

PSC Amount: \$900,000

1. Description of Work

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

PSC 46091 - 19/20 was approved by the Civil Service Commission on May 18, 2020 for the scope of work in this request.

PSC 46091 - 19/20 will expire on May 18, 2021, before the expected execution of SFPUC Contract PRO-0156. This request will allow the SFPUC to complete the execution of Contract PRO.0156.

Fish screen cleaning and Division of Safety of Dams-required valve exercising at raw water supplies including: San Antonio Reservoir, Calaveras Reservoir, Crystal Springs Reservoir, and San Andreas Reservoir.

Perform required treated water tanks and reservoir inspections and cleanings as required. Tanks and reservoirs to be inspected and cleaned are: Castlewood Reservoir, Tesla Treatment Facility domestic water tanks, Sunol Town Tanks, SVWTP Chlorine Contact Tank, SVWTP Treated Water Reservoir, The Balancing Reservoir, HTWTP Chlorine Contact Chamber, and HTWTP Treated Water Reservoir.

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

These services are required for the reliability of facilities and water supply to Surface Water Treatment Plants in the SFPUC. In addition, potable water tanks and reservoirs are required to be inspected and cleaned in accordance with the operations plan associated with the facility. The operations plan is a requirement for compliance with the California Code of Regulations Title 22. Facilities must be operated and maintained in accordance with Title 22.

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.

PSC 46091 - 19/20 was approved by the Civil Service Commission on May 18, 2020 for the scope of work in this request. PSC 46091 - 19/20 will expire on May 18, 2021, before the expected execution of SFPUC Contract PRO-0156. This request will allow the SFPUC to complete the execution of Contract PRO.0156. Contracting services. One such example was PO 0000360797, fish screen cleaning

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).

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:

Diving services are specialized work, not normally performed by city employees. Work is to be performed as needed or on schedule with various facilities' operations plans. An example of as needed diving services would be a fish screen matted over with algae, requiring cleaning. California Code of Regulations, Title 22 requires inspections and cleanings in accordance with facility operations plans.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: -Expertise in structural integrity of tanks, reservoirs, and fish screens - Possession of ANSI/ACDE 01-1993 minimum commercial diver training or equivalent -Confined space rescue certification -Compliance with OSHA CFR 1910.146, OSHA CFR 1910.20, OSHA CFR 1910.269, AWWA M3 Please reference memo attached
- B. Which, if any, civil service class(es) normally perform(s) this work? 7334, Stationary Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractor to provide all equipment needed to perform the tasks

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

The city does not have an in-house dive team. Other departments utilize dive services from contractors.

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

- A. Explain why civil service classes are not applicable.
Diving work requires certifications that are not held by in-house staff. SCUBA certification with occupational endorsement.
- 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. There is not a need for full time dive staff. This work is performed on occasion as needed or in accordance with operations plans schedules. At most, an annual inspection is required. Cleaning is typically performed once every five years.

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 03/23/2021, the Department notified the following employee organizations of this PSC/RFP

request:

Stationary Engineers, Local 39

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 Avenue 8th Floor San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46189 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of wirwin@sfwater.org
To: [Irwin, William](mailto:Irwin.William); seichenberger@local39.org; MRainsford@local39.org; grojo@local39.org; [Irwin, William](mailto:Irwin.William); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator.DHR)
Subject: Receipt of Notice for new PCS over \$100K PSC # 46189 - 20/21
Date: Tuesday, March 23, 2021 3:38:45 PM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

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

RECEIPT for Union Notification for PSC 46189 - 20/21 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 46189 - 20/21 for \$900,000 for Initial Request services for the period 10/01/2021 – 09/30/2026. 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/16228> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again, change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- 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: Dive team inspection and cleaning of raw water and treated water facilities (PRO.0156)

Funding Source: Water Enterprise Operating Budget

PSC Duration: 5 years

PSC Amount: \$900,000

1. Description of Work

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

Fish screen cleaning and Division of Safety of Dams-required valve exercising at raw water supplies including: San Antonio Reservoir, Calaveras Reservoir, Crystal Springs Reservoir, and San Andreas Reservoir.

Perform required treated water tanks and reservoir inspections and cleanings as required. Tanks and reservoirs to be inspected and cleaned are: Castlewood Reservoir, Tesla Treatment Facility domestic water tanks, Sunol Town Tanks, SVWTP Chlorine Contact Tank, SVWTP Treated Water Reservoir, The Balancing Reservoir, HTWTP Chlorine Contact Chamber, and HTWTP Treated Water Reservoir.

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

These services are required for the reliability of facilities and water supply to Surface Water Treatment Plants in the SFPUC. In addition, potable water tanks and reservoirs are required to be inspected and cleaned in accordance with the operations plan associated with the facility. The operations plan is a requirement for compliance with the California Code of Regulations Title 22. Facilities must be operated and maintained in accordance with Title 22.

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.

Contracting services. One such example was PO 0000360797, fish screen cleaning

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).

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:

Diving services are specialized work, not normally performed by city employees. Work is to be performed as needed or on schedule with various facilities' operations plans. An example of as needed diving services would be a fish screen matted over with algae, requiring cleaning. California Code of Regulations, Title 22 requires inspections and cleanings in accordance with facility operations plans.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: -Expertise in structural integrity of tanks, reservoirs, and fish screens - Possession of ANSI/ACDE 01-1993 minimum commercial diver training or equivalent -Confined space rescue certification -Compliance with OSHA CFR 1910.146, OSHA CFR 1910.20, OSHA CFR 1910.269, AWWA M3 Please reference memo attached

B. Which, if any, civil service class(es) normally perform(s) this work? 7334, Stationary Engineer;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
Contractor to provide all equipment needed to perform the tasks

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

The city does not have an in-house dive team. Other departments utilize dive services from contractors.

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

A. Explain why civil service classes are not applicable.

Diving work requires certifications that are not held by in-house staff. SCUBA certification with occupational endorsement.

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. There is not a need for full time dive staff. This work is performed on occasion as needed or in accordance with operations plans schedules. At most, an annual inspection is required. Cleaning is typically performed once every five years.

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 03/06/2020, the Department notified the following employee organizations of this PSC/RFP request:
Stationary Engineers, Local 39

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@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46091 - 19/20

DHR Analysis/Recommendation:

action date: 05/18/2020

Commission Approval Required

Approved by Civil Service Commission

05/18/2020 DHR Approved for 05/18/2020

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: Recyclable Refuse Sorting & Consolidation

Funding Source: General Fund

PSC Duration: 1 year 52 weeks

PSC Amount: \$2,000,000

1. Description of Work

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

Services are for on-site collection, consolidation, sorting and compacting of trash and recycling at Zuckerberg San Francisco General Hospital (ZSFGH).

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

In order to comply with the City's Refuse Separation Compliance Ordinance (No. 300-18), DPH/ZSFGH must consolidate and appropriately sort its refuse. This ordinance is an amendment to the City's Mandatory Recycling and Composting Ordinance (Chapter 19 of the Environment Code). It applies only to Large Refuse Generators (LRGs), such as ZSFGH. LRGs are defined as refuse service accounts with a roll-off compactor, or accounts with 40 cubic yards or more of uncompacted refuse per week. Refuse service includes all hauler-serviced collection bins containing recyclables, compostables and trash. The ordinance requires that (1) LRGs have their refuse audited at least every three years, to assess compliance with mandatory recycling and composting, and (2) if a property fails an audit and is found to have contamination above set limits in any of the three streams of refuse (recyclables, compostables, or trash), they must engage the services of a "Zero Waste Facilitator" to ensure adequate separation of refuse to be collected by a hauler (Recology). The consequences of denial are not only adverse effects on the environment and their associated costs to general public health, but the Department will fail an audit and be required to engage the services of a "Zero Waste Facilitator" to do the same function currently provided by the SF Conservation Corps.

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 Office of Contract Administration (OCA) issues the City's refuse contract, which for many years has been awarded to Recology. For the past 15 years, up to the pandemic, there has been a subcontract within the Recology contract to assist in facilitating consolidation of recycling collection at certain City department locations. These have always been contracted services for DPH. These subcontracted services have been provided by The Arc of San Francisco, a non-profit organization providing lifelong education and career opportunities for people with developmental disabilities. This contract has also served as an opportunity to provide workforce development or work-assistance programming for organizations like The Arc (and most recently, the San Francisco Conservation Corps) to provide recycling and/or composting consolidation services at specific City department locations that wanted this service. When the COVID-19 pandemic began, The ARC reached out to the department locations where they provided these consolidation services to inform them that The Arc would be sheltering in place and would not be able to provide services. Recology did provide an alternate organization, the San Francisco Conservation Corps (SFCC), to continue the consolidation services that The Arc had been providing. In December, 2020, OCA advised Departments that this subcontracted service for the consolidation of recycling materials would no longer be part of the larger refuse contract, which was being put out to bid. To continue these services, OCA asked DPH to request PSC approval prior to bidding the contract.

D. Will the contract(s) be renewed?

Yes, if funding is available.

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.

B. Explain the qualifying circumstances:

The services are needed immediately in order to avoid interruption in services and likely noncompliance with the City's Refuse Separation ordinance.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must be able to provide adequate staffing to efficiently sort and consolidate refuse throughout the facility and transport to a central location to be sorted appropriately into trash or recycling.

B. Which, if any, civil service class(es) normally perform(s) this work? 2708, Custodian;

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 Department has used the limited time available since it was made aware that that these services would not continue as they historically have to examine its immediate options and has determined that in order to remain in compliance utilizing the classifications available to it, it would need to continue to contract for the services previously under the Recology subcontract, since the only potential classification available to the Department not only was not appropriate, but critically needed to service acute care areas of ZSFGH as part of ongoing services and in response to the COVID-19 pandemic.

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

A. Explain why civil service classes are not applicable.

The Department of Public Health utilizes the classification 2736 Porter and does not utilize the 2708 Custodian classification, which is more likely appropriate to these services. Porters' work is part of providing quality patient/resident care, including cleaning of patient rooms, laboratories, pharmacies, and operating rooms, gathering laundry and delivering meals as well as the care of the hospital's physical plant, while Custodians work in other large departments concerned with providing transportation, recreation and education 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. Not at this time, since there is already a classification which might be used (Custodian).

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. While this contract currently provides education and training services to SFCC participants, it does not provide training directly to civil service employees.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

No.

7. Union Notification: On 03/27/2021, 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: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31866 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 06/21/2021

Receipt of Union Notification(s)

Hale, Jacquie (DPH)

From: dhr-psccordinator@sfgov.org on behalf of jacquie.hale@sfdph.org
Sent: Saturday, March 27, 2021 5:43 PM
To: Hale, Jacquie (DPH); Frigault, Noah (HRC); 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; Hale, Jacquie (DPH); DHR-
PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 31866 - 20/21

RECEIPT for Union Notification for PSC 31866 - 20/21 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 31866 - 20/21 for \$2,000,000 for Initial Request services for the period 07/01/2021 – 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/16005> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC LIBRARY

Dept. Code: LIB

Type of Request: Initial Modification of an existing PSC (PSC # 30481 - 19/20)

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

Type of Service: Binding of Library Materials

Funding Source: Library Preservation Fund

PSC Original Approved Amount: \$81,000 PSC Original Approved Duration: 01/01/20 - 12/31/24 (5 years 1 day)

PSC Mod#1 Amount: \$219,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$300,000 PSC Cumulative Duration Proposed: 5 years 1 day

1. Description of Work

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

Library seeks a bindery contractor to machine bind and rebind of books, periodicals, pamphlets, reports, newspapers, music scores and other materials not otherwise classified. Contractor's work must meet the specifications of the ANSI/NISO/LBI Library Binding Standard, 2000 and Guide to the ANSI/NISO/LBI Library Binding Standard 2008 (or most recent edition); as well as the Library's Binding Specifications. The company is also responsible for setting up a database of the required binding information for periodicals using the current Contractor's "rub information" which the Library will supply. This work must be done within 30 days of receipt of the binding information provided by the Library. There will be approximately 1,500 titles. They will also provide boxes for shipping of material and address labels for each carton at no extra cost. Pick-up and delivery of materials will be according to the schedule decided by San Francisco Public Library.

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

This service is necessary to ensure books are being preserved appropriately and according to the ANSI/NISO/LIB Library Binding Standards Library will not be able to provide patrons and staff the full runs of bound volumes of periodicals that they rely upon for research and reference, nor preserve important books that are out of print and cannot be replaced.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
yes

D. Will the contract(s) be renewed?
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:
n/a

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

The commercial bindery uses specialized equipment that can handle large quantities of books and periodicals. The months of December, January, and February see an increase in the size of shipments of periodicals, since many bound volumes include an entire calendar year of issues and the last of the issues are generally received during this time period. The City does not own this equipment, have space for the equipment and operations, nor have employees trained to operate this equipment.

B. Reason for the request for modification:

The demand has exceeded expectation. To better meet and reflect the needs of the Library, we are asking to increase the budget.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor has demonstrated success in machine-binding books and periodicals adhering to the ANSI/NISO/LBI Library Binding Standards and has experience delivering high-volume and high quality workmanship.

B. Which, if any, civil service class(es) normally perform(s) this work? none

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes,contract will provide binding materials and machinery that are necessary for the book binding process.

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.

The work is highly specialized. While we do have in-house staff that can bind rare books, we don't have staff or specialized equipment to bind large volumes of magazines and other types of bookbinding. The magazine binding process is very time consuming without the commercial equipment, therefore, we can't meet the volume of the work with just our in-house 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, it would not be practical to adopt a new civil service class to perform this work. There are already book binding companies with expertise in this highly specializedwork. Also, the type of machinery that the

vendor uses is very specific and specialized. We currently do not have the equipment or the industrial environment setting to support the type of work. Creating a civil service class just for this type of work will not be sufficient to handle the volume and the specialized nature of the work without the machinery. In addition, it's not a feasible option to purchase the equipment with the space limitation at our work space. In addition to the size of the machine, the cost to purchase one is another issue. The volume of work we send to book binary does not justify the cost of the machine.

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, the machinery is off-site in another state.
- 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 05/18/21, 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: marcus lange Phone: 415-557-4214 Email: marcus.lange@sfpl.org

Address: 100 Larkin Street, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 30481 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required
DHR Approved for 06/21/2021

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of marcus.lange@sfpl.org
To: [PSC RECEIPT of Modification notification sent to Unions and DHR](mailto:Lange, Marcus (LIB); cmoyer@nccrc.org; Frigault, Noah (HRC); sfdpoa@icloud.com; Mjayne@iam1414.org; 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@sfdlocal798.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); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; iduritz@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; Yoshida, Shirley (LIB); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 30481 - 19/20 - MODIFICATIONS
Date: Thursday, March 18, 2021 10:55:42 AM</p><hr/></div><div data-bbox=)

The PUBLIC LIBRARY -- LIB has submitted a modification request for a Personal Services Contract (PSC) for \$219,000 for services for the period March 18, 2021

– December 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/16189>

Email sent to the following addresses: jtanner940@aol.com
david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org xiumin.li@seiu1021.org
davidmkersten@gmail.com leah.berlanga@seiu1021.org ted.zarzecki@seiu1021.net
pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org
pcamarillo_seiu@sbcglobal.net Sandeep.lal@seiu1021.me
Kbasconcillo@sfwater.org
Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org sarah.wilson@seiu1021.org
junko.laxamana@sfgov.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC LIBRARY -- LIBDept. Code: LIBType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Binding of Library MaterialsFunding Source: Library Preservation FundPSC Amount: \$81,000PSC Est. Start Date: 01/01/2020PSC Est. End Date 12/31/2024**1. Description of Work**

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

Library seeks a bindery contractor to machine bind and rebind of books, periodicals, pamphlets, reports, newspapers, music scores and other materials not otherwise classified. Contractor's work must meet the specifications of the ANSI/NISO/LBI Library Binding Standard, 2000 and Guide to the ANSI/NISO/LBI Library Binding Standard 2008 (or most recent edition); as well as the Library's Binding Specifications. The company is also responsible for setting up a database of the required binding information for periodicals using the current Contractor's "rub information" which the Library will supply. This work must be done within 30 days of receipt of the binding information provided by the Library. There will be approximately 1,500 titles. They will also provide boxes for shipping of material and address labels for each carton at no extra cost. Pick-up and delivery of materials will be according to the schedule decided by San Francisco Public Library.

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

This service is necessary to ensure books are being preserved appropriately and according to the ANSI/NISO/LBI Library Binding Standards Library will not be able to provide patrons and staff the full runs of bound volumes of periodicals that they rely upon for research and reference, nor preserve important books that are out of print and cannot be replaced.

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?

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.

n/a

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

B. Explain the qualifying circumstances:

The commercial bindery uses specialized equipment that can handle large quantities of books and periodicals. The months of December, January, and February see an increase in the size of shipments of periodicals, since many bound volumes include an entire calendar year of issues and the last of the issues are generally received during this time period. The City does not own this equipment, have space for the equipment and operations, nor have employees trained to operate this equipment.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor has demonstrated success in machine-binding books and periodicals adhering to the ANSI/NISO/LBI Library Binding Standards and has experience delivering high-volume and

high quality workmanship.

- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contract will provide binding materials and machinery that are necessary for the book binding process.

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

n/a

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

- A. Explain why civil service classes are not applicable.
The work is highly specialized. While we do have in-house staff that can bind rare books, we don't have staff or specialized equipment to bind large volumes of magazines and other types of bookbinding. The magazine binding process is very time consuming without the commercial equipment, therefore, we can't meet the volume of the work with just our in-house 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, it would not be practical to adopt a new civil service class to perform this work. There are already book binding companies with expertise in this highly specialized work. Also, the type of machinery that the vendor uses is very specific and specialized. We currently do not have the equipment or the industrial environment setting to support the type of work. Creating a civil service class just for this type of work will not be sufficient to handle the volume and the specialized nature of the work without the machinery. In addition, it's not a feasible option to purchase the equipment with the space limitation at our work space. In addition to the size of the machine, the cost to purchase one is another issue. The volume of work we send to book binary does not justify the cost of these machines.

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, the machinery is off-site in another state.
- 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 12/27/2019, 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: marcus lange Phone: 415-557-4214 Email: marcus.lange@sfpl.org

Address: 100 Larkin Street San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 30481 - 19/20

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 01/22/2020