



London Breed
Mayor

Carol Isen
Human Resources Director

Date: March 18, 2022

To: The Honorable Civil Service Commission

Through: Carol Isen
Human Resources Director

From: Joan Lubamersky / Lynn Khaw, ADM
Esperanza Zapien / Johanna Gendelman, HSA
Genie Wong, POL
Shawndrea Hale / Daniel Kwon, PUC
Alexander Burns, DPW
Amanda Wentworth, TTX
Jenny Collins, ECN
Daniella Mattias, MYR
Jolie Gines/Henry Gong, TIS
Elisa Baeza, ADP

Subject: **Personal Services Contracts Approval Request**

This report contains twelve (12) 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 21/22 to date:

Total of this Report	YTD Expedited Approvals FY2021-2022	Total for FY2021-2022
\$249,804,696	\$188,004,068	\$2,052,253,330

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POSTING FOR

April 04, 2022

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
47251 - 21/22	GENERAL SERVICES AGENCY - CITY ADMIN	\$6,000,000.00	Provide a site where Public Works (PW) and other City departments can deposit truckloads of construction and demolition (C&D) material including asphalt grindings, concrete, and mixed loads that contain soil, wood, or other construction materials for reuse, recycling, or proper disposal. These C&D materials are generated as a by-product of the City's Street Paving Program, ADA Curb Ramp Installation Program, sewer lateral replacements, manhole and catch basin installations and adjustments, concrete and brick sidewalk repairs and replacements, and other municipal maintenance projects located within the public right-of-way.	June 1, 2022	May 31, 2027	REGULAR
43731 - 21/22	HUMAN SERVICES	\$600,000.00	The Contractor will: a. Resolve issues and complaints regarding the FCS Division as an Ombudsman. San Francisco Human Services Agency (HSA) shall be responsible for reviewing and taking the final action on any recommendations. The contractor is expected to respond to three levels of concerns: i. Requests for information, including identification of resources and clarification of policies ii. Issues requiring facilitation by the Ombudsman iii. Assist parties in submitting formal written complaints directed to FCS Management regarding issues that cannot be resolved through direct meetings with the Child Welfare Worker. b. Meet with clients and/or their care provider at HSA offices and/or community locations as necessary to provide information, make referrals, and conduct complaint intakes.	July 1, 2022	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>c. Consult with FCS Management and staff to resolve the issues or complaints.</p> <p>d. Assist the complainant in resolving the issue. Resolution may include, but is not limited to, the following:</p> <ul style="list-style-type: none"> i. Clarification of FCS rules and policies ii. Mediation between the client and staff as appropriate iii. Forged agreements between staff, client, or other parties involved in the complaint <p>e. Meet with FCS Deputy Director or his/her designee at least quarterly to provide feedback regarding client service issues and to make policy recommendations.</p> <p>f. Compile program data for monthly reports summarizing the number, source, nature, and outcome of complaints handled and reporting hours of service provided.</p> <p>g. Develop and maintain individual case files for every complaint. Issue a letter outlining the complaint, findings, and recommendations to the complainant, as appropriate.</p> <p>h. Participate in FCS's Parent Advisory Committee (PAC), and other committees relevant to client concerns, as needed.</p>			
44080 - 21/22	POLICE	\$7,100,000.00	<p>The Contractor will provide Information Technology (IT) and infrastructure consulting, detailed integration work among Software as a Service (SaaS) platform and law enforcement systems, high-touch troubleshooting and diagnostics, strategic guidance and support, implementations and implementation consulting, SaaS platform configurations, and initial train-the-trainer training for permanent civil service classifications.</p> <p>The amount of the PSC includes all contract costs.</p>	April 1, 2022	June 30, 2027	REGULAR
42154 - 21/22	PUBLIC UTILITIES COMMISSION	\$90,000,000.00	<p>The SFPUC Infrastructure Division and Wastewater Enterprise (WWE) seeks consultant services to provide specialized program management support for the Wastewater Capital Improvement Plan. These services are required to continue a number of programmatic functions such as strategic capital planning, risk management, pre-construction technical advice, pre-construction planning and management, labor and contract relations, development and refinement of standards, preparation of</p>	September 1, 2022	August 31, 2032	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			programmatic schedules and budgets, analysis of alternative project delivery mechanisms and asset management.			
49372 - 21/22	PUBLIC UTILITIES COMMISSION	\$136,500,000.00	The San Francisco Public Utilities Commission (SFPUC) requires Scheduling Coordinator (SC) Services provided to the Hetch Hetchy (HHP) and CleanPowerSF energy portfolios for participation in the California Independent System Operator (CAISO) energy markets. The SC will assist the SFPUC and both energy portfolios in optimizing its short-term resource utilization and service to its loads, including but not limited to submittal of Day Ahead and Real Time generation, load, and interchange schedules, submitting bids, submitting energy trades, managing communications between CAISO, SFPUC schedulers, and Power House Operators, handling settlements, and other related services. The CAISO high and low voltage wheeling charges are required to be paid through SFPUC's contracted Scheduling Coordinator (SC) such that these charges can be paid to support our energy transmission from Hetch Hetchy system to San Francisco customers. CAISO's tariffs define these charges as a type of "pass-through charge" that SC will pay the charge to CAISO on the behalf of the SC client (e.g. SFPUC) without any additional fee for the pass-through charge. The CAISO settlement charges are paid on behalf of SFPUC and in accordance to the CAISO Payments Calendar. The breakdown of charges are as follows: \$6,000,000 for the contract costs and \$130,500,000 for the CAISO pass-through charges.	April 8, 2022	April 7, 2027	REGULAR
44155 - 21/22	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$3,000,000.00	Services are for financial consulting in facilities acquisition in conjunction with Mission Bay Development - Community Facilities Districts Nos 4&6 (CFD #4 & #6). The Consultant's principal responsibilities will be to advise San Francisco Public Works (SFPW) on the interpretation of existing agreements with Developer, the determination of reimbursements, the settling of cost allocation and acquisition reimbursement protocols.	April 4, 2022	April 3, 2028	REGULAR
42046 - 21/22	TREASURER/TAX COLLECTOR	\$3,000,000.00	The Office of the Treasurer and Tax Collector is seeking to procure licensed armored car and secure safe services to serve all departments citywide. Suppliers must have experience offering high-security, high-volume armored transport, currency processing, smart vault and change order services. These services will be used to assist City departments with the movement of currency,	March 1, 2022	February 29, 2032	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			coins and checks to designated vaults and cash processing centers. These services include: 1) secure and efficient transportation of Citywide cash and check collections and deposits to bank. 2) deposit pickup from various citywide cash collections points, change order service and delivery, and emergency cash services. 3) providing secured vaults or safes in various department locations which departments can use to deposit their collections and when it is most advantageous.			

TOTAL AMOUNT \$246,200,000

POSTING FOR

April 04, 2022

PROPOSED PERSONAL SERVICES CONTRACTS – MODIFICATION

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
33441 13/14 - MODIFICATIONS	April 4, 2022	ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN	\$2,000,000	\$4,350,000	Contractors will provide business consulting and training services to the Small Business Development Center's (SBDC's) small business clients on an as-needed basis. SBDC is a program hosted by the City through the Office of Economic and Workforce Development (OEWD) as part of a greater network of services to help small- to medium-sized businesses grow and succeed. The Contractors' counseling services will include advice, guidance and/or instruction concerning the formation, management, financing, and operation of small business enterprises through workshops, one-on-one consulting, and loan packaging. Through a Request For Qualifications, OEWD created a pre-qualified list of 24 consultants who	07/01/2025	06/30/2027	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					will remain eligible for consideration and contract negotiation on an as-needed basis for two years.			
40166 - 17/18 - MODIFICATIONS	April 4, 2022	MAYOR -- MYR	\$828,000	\$1,930,000	To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.	01/01/2022	12/31/2024	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
49622 - 18/19 - MODIFICATIONS	April 4, 2022	GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS	\$776,696	\$1,894,973	Vendor will install a Jail Management System (JMS) and to work with San Francisco Sheriff Department Information Technology Support Services Staff (ITSS) to configure a prototype of the Inmate Booking Module in JMS. This service shall include a subscription to use the JMS software in conjunction with the San Francisco Sheriff Department existing Microsoft Dynamic CRM licenses. The prototype would be used by San Francisco Sheriff Department in a non-production environment for the duration of the subscription (12 months) in order to confirm that Vendor's JMS will meet the jail management system needs of San Francisco Sheriff Department. The scope, assumptions, and costs presented in this SOW represent Vendor proprietary experience and knowledge. A. Project Scope Vendor will work with San Francisco Sheriff Department to install Offender360 JMS and all technology components	04/01/2022	03/31/2024	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					<p>associated with the software in a non-production San Francisco Sheriff Department environment on their server hardware. Vendor will conduct a series of training workshops with San Francisco Sheriff Department Information Technology Staff to enable San Francisco Sheriff Department To make configuration changes to the standard JMS Booking module and develop a non-production prototype that meets the specific business requirements of San Francisco Sheriff Department for the booking process. Vendor will include in the services a 12 month subscription of the Offender360 JMS software to allow San Francisco Sheriff Department users to test the application in a non-production environment for up to 12 months. The result of this project will provide a prototype that will enable San Francisco Sheriff Department to validate and confirm that Offender360 will meet the jail</p>			

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					management system needs of San Francisco Sheriff Department.			
49068 - 14/15 - MODIFICATIONS	April 4, 2022	ADULT PROBATION -- ADP	\$0	\$3,500,000	<p>Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize SYSCON's (Vendor) existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice.</p> <p>Scope Change: Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize Vendor's existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other</p>	07/01/2021	05/31/2023	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					California jurisdictions, including the California Department of Justice.			
39380 - 15/16 - MODIFICATIONS	April 4, 2022	POLICE -- POL	\$0	\$140,000	<p>The contractor will provide emergency repair services and preventative maintenance and parts for the San Francisco Police Department's 16 freezers and 6 refrigerators which store evidence. A list of equipment is attached.</p> <p>Scope Change: Contractor will no longer perform preventative maintenance work. Contractor will be contacted for urgent repairs requiring a 4-hour window response only.</p>	05/01/2022	04/30/2024	ADMINISTRATIVE APPROVAL

TOTAL AMOUNT \$3,604,696

**Regular/Continuing/Annual
Personal Services Contracts**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

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

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

Type of Service: Asphalt Grindings and Concrete Disposal Services

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$6,000,000

1. Description of Work

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

Provide a site where Public Works (PW) and other City departments can deposit truckloads of construction and demolition (C&D) material including asphalt grindings, concrete, and mixed loads that contain soil, wood, or other construction materials for reuse, recycling, or proper disposal. These C&D materials are generated as a by-product of the City's Street Paving Program, ADA Curb Ramp Installation Program, sewer lateral replacements, manhole and catch basin installations and adjustments, concrete and brick sidewalk repairs and replacements, and other municipal maintenance projects located within the public right-of-way.

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

When work is performed in the existing public right-of-way, the existing improvements need to be removed. For example, prior to repaving a street, the existing 2-inches of asphalt are removed with a cold planer that grinds away the asphalt and creates asphalt grindings. Other improvements in the street may include excavating the full depth of asphalt pavement, concrete base, and sub-base to make the needed improvements. These excavated materials are generated as a C&D waste by-product. This service is necessary so that these waste by-products can be properly collected and disposed. The proper disposal of C&D waste allows for the by-product to be separated and turned into reusable products, including aggregates of various sizes. This promotes sustainability by recycling the waste by-products and keeping them out of landfills. Denial would result in PW and other City departments sending this C&D material to landfill facilities, which would run counter to the City's green purchasing efforts and efforts to improve environmental sustainability.

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

These services were provided using other City procurement methods. We have been advised to request approval of a Personal Services Contract (PSC).

D. Will the contract(s) be renewed?

Yes

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

not applicable

2. Reason(s) for the Request

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

Services 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:

Services will be required when the City performs maintenance projects in the existing City right-of-way, such as street paving projects, installation of ADA curb ramps, sewer lateral replacements, etc. Vendor will supply land, a facility, and equipment to properly handle the C&D material generated by the City's activities.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Required experience in the disposal of asphalt grindings, concrete, and other materials generated as by-product to paving projects. Vendor must provide a facility with the capacity to accept up to 44,000 tons of these paving by-products per year. Vendor must have all required Federal, State and local regulatory permits and demonstrate the ability to be approved for subsequent renewals of these permits. Such permits include Bay Area Air Quality Management District permit(s), business licenses, and any other environmental health and hazardous materials storage certificates, and documentation of compliance with all environmental reuse compliance measures for the City and County of San Francisco and State of California.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7221, Asphalt Plant Supervisor 1; 7424, Dryer Mixer Operator;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide facilities and equipment necessary to properly handle C&D material resulting from the City's Street Paving Program and other municipal maintenance projects.

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

The City does not have the facility or the equipment necessary to perform these services.

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

- A. Explain why civil service classes are not applicable.
The work varies with the municipal maintenance projects' schedules and availability of funds. Additionally, the City does not have a facility to perform these services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The City does not have the facility and equipment necessary to perform these services.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
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 02/07/2022, the Department notified the following employee organizations of this PSC/RFP request:

Operating Engineers, Local 3

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

Name: Lynn Khaw Phone: 4155546296 Email: lynn.khaw@sfgov.org

Address: City Hall, RM 430, 1 Dr. Carlton B. Goodlett Pl. San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47251 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

Khaw, Lynn (ADM)

From: Khaw, Lynn (ADM)
Sent: Monday, February 7, 2022 5:17 PM
To: 'dtuttle@oe3.org'
Subject: City of San Francisco Personal Services Contract Notice to Operating Engineers Local 3
Attachments: PSC #47251, Asphalt Grindings & Concrete Disposal Services, Submitted 2-7-22.pdf; EM sent thru online PSC system, not sent to Local 3, 2-7-22.pdf; DHR website selection for L3 notification, 2-7-22.pdf

Dear Mr. Tuttle,

The Office of Contract Administration of the City and County of San Francisco proposes to do a Personal Services Contract (PSC) to contract for intermittent, as-needed services of a facility and personnel to collect and reuse, recycling or proper disposal of asphalt grindings, concrete and other materials generated as a by-product of the City's street paving program and other related projects. Information on this PSC is attached.

City departments are required by the Department of Human Resources and the Civil Service Commission to notify employee organizations when we request to contract for services that City employees could possibly perform. In this case, Class 7221, Asphalt Plant Supervisor 1 and 7424, Dryer Mixer Operator, could possibly perform some of the duties. Your union is listed as one that would be notified through the City's online system, however, it appears that you were not. Please see attached selection of Local 3 to receive notice of this PSC and information that serves as notice.

Typically, unions have 30 days to review and ask questions about a PSC. If you should have any questions, please let me know at lynn.khaw@sfgov.org or contact the Department of Human Resources, DHR-PSC coordinator at dhr-pscordinator@sfgov.org.

Sincerely,
Lynn

Attachments:

- Proposed PSC #47251 – 21/22
- Email sent through online PSC system, not sent to Local 3
- DHR website selection for Local 3 notification

Lynn Khaw, CPPO, CPPB, C.P.M.
Office of Contract Administration
City and County of San Francisco
Working remotely from 8:00 AM – 5:00 PM, Mon-Fri
(415) 554-6296 – *Calls will be forwarded to mobile phone*
Email: lynn.khaw@sfgov.org
Webpage: <https://sfgov.org/oca/>



***If you signed up but are not receiving updates, please first check your spam folder before re-registering!**

Khaw, Lynn (ADM)

From: dhr-psccordinator@sfgov.org on behalf of lynn.khaw@sfgov.org
Sent: Monday, February 7, 2022 3:43 PM
To: Khaw, Lynn (ADM); Khaw, Lynn (ADM); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 47251 - 21/22

RECEIPT for Union Notification for PSC 47251 - 21/22 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 47251 - 21/22 for \$6,000,000 for Initial Request services for the period 06/01/2022 – 05/31/2027. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/17925> 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)

Prior approved PSC #43424 -19-20, which expired before use

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM Dept. Code: ADM

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

Type of Approval: [] Expedited [x] Regular ([] Omit Posting)

Type of Service: Asphalt Grindings and Concrete Collection and Disposal Services

Funding Source: General Fund PSC Duration: 5 years
PSC Amount: \$6,000,000 PSC Est. Start Date: 01/01/2020 PSC Est. End Date: 12/30/2024

1. Description of Work

A. Scope of Work:

Provide a site where the Department of Public Works (DPW) and other City departments can deposit truckloads of asphalt grindings, concrete and other materials that are generated as a by-product of the City's Street Paving Program and provide for proper disposal of materials brought to that site.

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

When streets are re-paved or repaired, asphalt grindings and concrete are generated as a waste by-product. This service is necessary so that these waste by-products can be properly collected and disposed. The proper disposal of asphalt and concrete waste allows for the by-product to be turned into reusable aggregate, which improves sustainability by recycling waste by-products and keeping it out of landfills. Denial would result in DPW and other City departments having to send these paving by-products to landfill facilities, which would run counter to the City's green purchasing efforts and efforts to improve environmental sustainability.

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

These services were provided using other City procurement methods. We have been advised to request approval of a Personal Services Contract (PSC).

D. Will the contract(s) be renewed? Yes

2. Union Notification: On 01/15/2020, the Department notified the following employee organizations of this PSC/RFP request: Operating Engineers, Local 3

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43424 - 19/20

DHR Analysis/Recommendation:

03/16/2020

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 03/16/2020

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise:
Five years of experience within the last seven years in the collection and disposal of asphalt grindings, concrete, and other materials generated as by-product to paving projects. Vendor must provide a facility with the capacity to accept up to 44,000 tons of these paving by-products per year. Vendor must have all required Federal, State and local regulatory permits and demonstrate the ability to be approved for subsequent renewals of these permits. Permits must include Bay Area Quality permit(s), business licenses, environmental health and hazardous
- B. Which, if any, civil service class(es) normally perform(s) this work?
7221,7424,
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
Yes. Contractor will provide facilities and equipment necessary to collect, process, and properly dispose of paving by-products resulting from the City's Street Paving Program.

4. Why Classified Civil Service Cannot Perform

- A. Explain why civil service classes are not applicable:
The work is intermittent and sporadic, varying with the Street Paving Program schedule and availability of funds. Additionally, the City does not have a facility to perform these services.
- B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No. The City does not have the facility and equipment necessary to perform these services.

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

YES NO

- A. Will the contractor directly supervise City and County employee? YES NO
- B. Will the contractor train City and County employee?
No training will be provided. YES NO
- C. Are there legal mandates requiring the use of contractual services? YES NO
- D. Are there federal or state grant requirements regarding the use of contractual services? YES NO
- E. Has a board or commission determined that contracting is the most effective way to provide this service? YES NO
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? YES NO

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 02/18/2020 BY:

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place, Room 362 San Francisco, CA 04102

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Ombudsman Services for Family & Children's Services

Funding Source: County 75%; State 12%; Federal 13%

PSC Amount: \$600,000

PSC Est. Start Date: 07/01/2022

PSC Est. End Date 06/30/2026

1. Description of Work

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

The Contractor will:

a. Resolve issues and complaints regarding the FCS Division as an Ombudsman. San Francisco Human Services Agency (HSA) shall be responsible for reviewing and taking the final action on any recommendations. The contractor is expected to respond to three levels of concerns:

i. Requests for information, including identification of resources and clarification of policies

ii. Issues requiring facilitation by the Ombudsman

iii. Assist parties in submitting formal written complaints directed to FCS Management regarding issues that cannot be resolved through direct meetings with the Child Welfare Worker.

b. Meet with clients and/or their care provider at HSA offices and/or community locations as necessary to provide information, make referrals, and conduct complaint intakes.

c. Consult with FCS Management and staff to resolve the issues or complaints.

d. Assist the complainant in resolving the issue. Resolution may include, but is not limited to, the following:

i. Clarification of FCS rules and policies

ii. Mediation between the client and staff as appropriate

iii. Forged agreements between staff, client, or other parties involved in the complaint

e. Meet with FCS Deputy Director or his/her designee at least quarterly to provide feedback regarding client service issues and to make policy recommendations.

f. Compile program data for monthly reports summarizing the number, source, nature, and outcome of complaints handled and reporting hours of service provided.

g. Develop and maintain individual case files for every complaint. Issue a letter outlining the complaint, findings, and recommendations to the complainant, as appropriate.

h. Participate in FCS's Parent Advisory Committee (PAC), and other committees relevant to client concerns, as needed.

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

The Human Services Agency Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families. FCS has an ongoing need for a contracted consultant to serve as an ombudsman to respond to complaints from clients, foster/adoptive parents and biological parents regarding the FCS Division as well as properly and thoroughly investigate and facilitate resolution of said complaints. It is absolutely essential for the Department to contract for an impartial third party to intervene and attempt to resolve client issues regarding FCS services. There is no City staff position that would possess the versatility and objectivity to investigate/research client issues, seek redress if necessary and appropriate, and submit reporting regarding client interventions that serve to inform the FCS division's toward shaping its policies and procedures to become more responsive to the needs of clients it serves. Denial of this request would effectively close the only neutral, no cost outlet available to clients of child welfare services toward airing their concerns and seeking constructive solutions for resolving said concerns. Further, the Department would lose valuable client insight as to the impact of Department services on the clients it serves.

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

These services have always been provided under contract. The service was previously provided under PSC 2001-08/09, most recently approved by the Commission on 6/16/14 under continuing resolution. The Department is electing to use a new PSC to more explicitly define the services and improve transparency.

D. Will the contract(s) be renewed?

Yes, most likely should funding be available and the contractor's performance is satisfactory to the Department.

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):

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.

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

B. Explain the qualifying circumstances:

The Human Services Agency's Family and Children's Services Division (FCS) has an ongoing need for a contracted consultant to serve as an ombudsman to respond to complaints from clients, foster/adoptive parents and biological parents regarding the FCS Division as well as properly and thoroughly investigate and facilitate resolution of said complaints. It is absolutely essential for the Department to contract for an impartial, independent third party to intervene and attempt to resolve client issues regarding FCS services. There is no City staff position that would possess the versatility, objectivity and independence necessary to investigate/research client issues (particularly those involving Department staff), seek redress if necessary and appropriate, and submit reporting regarding client interventions that serve to inform the FCS division's toward shaping its policies and procedures to become more responsive to the needs of clients it serves.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. A minimum of three years demonstrated experience providing Ombudsman Services for a social services agency providing child welfare services 2. A minimum of three years demonstrated experience working with biological parents, children and youth, relatives, foster and adoptive parents, caregivers and resource families who receive or have received services from a child welfare agency. 3. A minimum of three years of demonstrated experience in mediation and dispute resolution of complaints on behalf of children and families linked to child welfare services.

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?

There presently is no City class that performs ombudsman services specifically for children and families linked to the child welfare system, nor is there any City department that has employees with the necessary qualifications and experience to provide these services to this specific target population. The Human Services Agency has competitively bid for these services under contract for the duration of their use.

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

A. Explain why civil service classes are not applicable.

This is highly specialized work with a specific target population that requires a neutral party not employed by the City to intervene on behalf of clients served by the Human Services Agency Family & Children's Services Division. In order to be impartial in conflicts between city staff and child protective services clients, HSA cannot use city staff who would in turn be perceived as being biased toward city 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. While the City could eventually adopt a class that would be exclusive to the Human Services Agency which encompassed the essential skill sets needed to perform ombudsman services working with the specific target population of children and families linked to child welfare, it cannot replicate the necessary objectivity or transparency required to intervene on behalf of clients served by the Department particularly in matters that involve the actions of Department staff and/or relate to the policies and procedures of the Department that may be the source of the client complaints or concerns. It would be neither effective or appropriate to require City staff to investigate matters on behalf of clients that involve the actions of other City staff in the same Department.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation. No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. Explanation of training has not been provided by the department
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. **Union Notification:** On 01/14/2022, 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: johanna gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Mission Street, 5th Floor San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43731 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

Gendelman, Johanna (HSA)

From: dhr-psccordinator@sfgov.org on behalf of johanna.gendelman@sfgov.org
Sent: Friday, January 14, 2022 2:11 PM
To: Gendelman, Johanna (HSA); snaranjo@cirseiu.org; mdennis@twusf.org; roger marenco; pwilson@twusf.org; 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; @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@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Alvarez, Tara (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 43731 - 21/22

RECEIPT for Union Notification for PSC 43731 - 21/22 more than \$100k

The HUMAN SERVICES -- DSS has submitted a request for a Personal Services Contract (PSC) 43731 - 21/22 for \$600,000 for Initial Request services for the period 07/01/2022 – 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/17839> 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: HUMAN SERVICESDept. Code: DSSType of Request: Initial Modification of an existing PSC (PSC # 34995 - 17/18)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Ombudsman Services for Family & Children's ServicesFunding Source: County 75%; State 12%; Federal 13%PSC Original Approved Amount: \$88,788 PSC Original Approved Duration: 10/01/17 - 06/30/18 (38 weeks 6 days)PSC Mod#1 Amount: \$568,234 PSC Mod#1 Duration: 07/01/18-06/30/22 (4 years 1 day)PSC Cumulative Amount Proposed: \$657,022 PSC Cumulative Duration Proposed: 4 years 39 weeks**1. Description of Work**

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

The Contractor will:

a. Resolve issues and complaints regarding the FCS Division as an Ombudsman. San Francisco Human Services Agency (HSA) shall be responsible for reviewing and taking the final action on any recommendations. The contractor is expected to respond to three levels of concerns:

i. Requests for information, including identification of resources and clarification of policies

ii. Issues requiring facilitation by the Ombudsman

iii. Assist parties in submitting formal written complaints directed to FCS Management regarding issues that cannot be resolved through direct meetings with the Child Welfare Worker.

b. Meet with clients and/or their care provider at HSA offices and/or community locations as necessary to provide information, make referrals, and conduct complaint intakes.

c. Consult with FCS Management and staff to resolve the issues or complaints.

d. Assist the complainant in resolving the issue. Resolution may include, but is not limited to, the following:

- i. Clarification of FCS rules and policies
 - ii. Mediation between the client and staff as appropriate
 - iii. Forged agreements between staff, client, or other parties involved in the complaint
- e. Meet with FCS Deputy Director or his/her designee at least quarterly to provide feedback regarding client service issues and to make policy recommendations.
- f. Compile program data for monthly reports summarizing the number, source, nature, and outcome of complaints handled and reporting hours of service provided.
- g. Develop and maintain individual case files for every complaint. Issue a letter outlining the complaint, findings, and recommendations to the complainant, as appropriate.
- h. Participate in FCS's Parent Advisory Committee (PAC), and other committees relevant to client concerns, as needed.

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

The Human Services Agency Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families. FCS has an ongoing need for a contracted consultant to serve as an ombudsman to respond to complaints from clients, foster/adoptive parents and biological parents regarding the FCS Division as well as properly and thoroughly investigate and facilitate resolution of said complaints. It is absolutely essential for the Department to contract for an impartial third party to intervene and attempt to resolve client issues regarding FCS services. There is no City staff position that would possess the versatility and objectivity to investigate/research client issues, seek redress if necessary and appropriate, and submit reporting regarding client interventions that serve to inform the FCS division's toward shaping its policies and procedures to become more responsive to the needs of clients it serves. Denial of this request would effectively close the only neutral, no cost outlet available to clients of child welfare services toward airing their concerns and seeking constructive solutions for resolving said concerns. Further, the Department would lose valuable client insight as to the impact of Department services on the clients it serves.

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, most likely should funding be available and the contractor's performance is satisfactory to the Department.

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

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

Explain the qualifying circumstances:

The Human Services Agency's Family and Children's Services Division (FCS) has an ongoing need for a contracted consultant to serve as an ombudsman to respond to complaints from clients, foster/adoptive parents and biological parents regarding the FCS Division as well as properly and thoroughly investigate and facilitate resolution of said complaints. It is absolutely essential for the Department to contract for an impartial, independent third party to intervene and attempt to resolve client issues regarding FCS services. There is no City staff position that would possess the versatility, objectivity and independence necessary to investigate/research client issues (particularly those involving Department staff), seek redress if necessary and appropriate, and submit reporting regarding client interventions that serve to inform the FCS division's toward shaping its policies and procedures to become more responsive to the needs of clients it serves.

B. Reason for the request for modification:

HSA is in the process of changing from continuous PSC to time limited, service specific PSC. The first expedited PSC was requested to ensure continuity of services. This PSC is being made for CSC review for a four year renewal of the initial contract.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. A minimum of three years demonstrated experience providing Ombudsman Services for a social services agency providing child welfare services 2. A minimum of three years demonstrated experience working with biological parents, children and youth, relatives, foster and adoptive parents, caregivers and resource families who receive or have received services from a child welfare agency. 3. A minimum of three years of demonstrated experience in mediation and dispute resolution of complaints on behalf of children and families linked to child welfare services.

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

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

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

Not Applicable

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

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

This is highly specialized work with a specific target population that requires a neutral party not employed by the City to intervene on behalf of clients served by the Human Services Agency Family & Children's Services Division. In order to be impartial in conflicts between city staff and child protective services clients, HSA cannot use city staff who would in turn be perceived as being biased toward city 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. While the City could eventually adopt a class that would be exclusive to the Human Services Agency which encompassed the essential skill sets needed to perform ombudsman services working with the specific target population of children and families linked to child welfare, it cannot replicate the necessary objectivity or transparency required to intervene on behalf of clients served by the Department particularly in matters that involve the actions of Department staff and/or relate to the policies and procedures of the Department that may be the source of the client complaints or concerns. It would be neither effective or appropriate to require City staff to investigate matters on behalf of clients that involve the actions of other City staff in the same Department.

6. Additional Information

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

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

contractor will not train 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.

An expedited PSC was created for continuity of services,.

7. **Union Notification:** On 02/09/18, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: John Tsutakawa Phone: 415-557-6299 Email: john.tsutakawa@sfgov.org

Address: 1650 Mission St, Suite 300, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 34995 - 17/18

DHR Analysis/Recommendation:

03/19/2018

Commission Approval Required

Approved by Civil Service Commission

03/19/2018 DHR Approved for 03/19/2018

Meeting Information

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AMENDED

MINUTES

Regular Meeting
September 21, 2009

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

CALL TO ORDER

2:09 p.m.

ROLL CALL

President Morgan R. Gorrone	Present
Vice President E. Dennis Normandy	Not Present (Notified Absence)
Commissioner Joy Y. Boatwright	Present
Commissioner Donald A. Casper	Present
Commissioner Mary Y. Jung	Present

President Morgan R. Gorrone presided.

PUBLIC COMMENT ON MATTERS APPEARING ON THE AGENDA

Virginia Morgan, appellant in Item #9 expressed her desire to reach a resolution on her appeal.

APPROVAL OF MINUTES

Regular Meeting of August 17, 2009

0267-09-8 **Action:** Approved. (Vote of 4 to 0)
Review of request for approval of proposed personal services contracts.
 (Item No. 5)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4028-09/10	GSA-Fleet Management	\$500,000	Will provide car-sharing services to supplement City's vehicle fleet to make additional vehicles available during peak demands for City employees to use on official City business.	Regular	08/23/12

August 17, 2009: Adopt the Human Resources Director's report on PSC #4028-09/10 on the condition that the General Services Administration meet and/or share the data gleaned from the experiment with TWU Local 250A and Auto Machinists Local 1414 to evaluate the effectiveness of the program on a quarterly basis. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 2 to 1; Commissioner Gorrone dissents.) Continue to the meeting of September 21, 2009. (Three (3) votes are needed for Commission action.)

Speakers: None.

Action: Approve the request for proposed personal services contract. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0295-09-8 **Review of request for approval of proposed personal services contracts.**
 (Item No. 6)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4030-09/10	Public Works – Bureau of Architecture	\$4,000,000	Will provide as-needed design services for Health Facilities involving renovation, adaptive re-use of existing facilities, installations of specialized medical equipment, modifications to life safety systems and other infrastructure, and facilities.	Regular	04/28/15
4031-09/10	Public Works	\$3,000,000	Will provide all necessary services required for a turnkey management solution for the following: procurement process for furniture, fixtures, and equipment (FF&E) for the San Francisco General Hospital-Rebuild Program.	Regular	12/31/16
4032-09/10	Arts Commission	\$306,000	Will conduct creative writing classes with youth in need at up to 10 sites in San Francisco. Artists-in-Residence will serve youth who may be educationally disadvantaged, recently immigrated, homeless, incarcerated or in crisis.	Regular	06/30/10
4033-09/10	Public Utilities Commission	\$2,500,000	Will provide professional construction management services to oversee a Wastewater Enterprise construction project, the Sunnydale Sewer Auxiliary Tunnel, on behalf of the SFPUC.	Regular	03/01/12
4034-09/10	Public Utilities Commission	\$400,000	Will provide at minimum, daily aerial patrol of Watershed lands during CALFIRE declared fire season to be coordinated by the respective parties' designated representatives.	Regular	10/01/17
4035-09/10	Treasurer and Tax Collector's Office	\$400,000	Will provide new payment processing system; licensing fees and annual software maintenance costs and professional services in custom programming, installation and training.	Regular	12/31/14
4036-09/10	Municipal Transportation Agency	\$217,634	Will provide labor, materials, consumables and supervision to repair, restore and rebuild two accident damaged LRVs from SFMTA's fleet of 151 vehicles.	Regular	11/01/10
4037-09/10	Building Inspection	\$4,200,000	Will install, configure, customize, test, and train City staff on the design, configuration, implementation, maintenance, and operation of a new proprietary Permit and Project Tracking System (PPTS).	Regular	12/31/16
4038-09/10	Controller's Office	\$1,500,000	Will provide municipal financing advisory services to Office of Public Finance, Controller's Office, and other City department staff in the following areas: general obligation bonds, certificates of participation and lease revenue bonds.	Regular	10/16/14
4112-06/07	Human Resources	Increase Amount \$125,000 New Amount \$1,625,000	Will provide computer software, licensing, and software support for proprietary workers' compensation claims management system. Modification for implementation of upgraded web-based system.	Modification	06/30/11
4163-07/08	Public Utilities Commission	Increase Amount \$1,300,000 New Amount \$1,900,000	Will provide a High Efficiency Toilet (HET) Direct Install Program for Low Income Customers in the retail services area. Services include installation, coordination of recycling of replaced fixture, and some leak and audit activities.	Modification	06/30/12
4021-09/10	Municipal Transportation Agency	Increase Amount \$26,752,554 New Amount \$56,752,554	Will perform a rehabilitation of key operating systems of the SF Municipal Transportation Agency's (SFMTA's) Light Rail Vehicles (LRVs) to restore systems to their original operating specifications to extend component life and improve vehicle reliability.	Modification	08/31/16

Action: Approve request for proposed personal services contracts. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0065-09-7 Determination of future employability: permanent part time appointment of Antoine Oliver, Library Page (Job Code 3602), San Francisco Public Library. (Item No. 7)

June 15, 2009: No future employment with the San Francisco Public Library. (Vote of 2 to 1; Commissioner Boatwright dissents.) Continue to the meeting of July 6, 2009. (Three (3) votes are needed for Commission action.)

July 6, 2009: Continue to the meeting of August 17, 2009 pending the resolution of arbitration.

August 17, 2009: Postpone to the meeting of September 21, 2009.

Speakers: Mark Vandiver, San Francisco Public Library
Steve Pitocchi, SEIU Local 1021

Action: Off calendar pending resolution of arbitration. (Vote of 4 to 0)

0727-07-7 Determination of future employability: permanent civil service appointment of David Chan, Assistant Electronic Maintenance Technician (Job Code 7340), with the Municipal Transportation Agency. (Item No. 8)

August 17, 2009: Postpone to the meeting of September 21, 2009.

Speakers: Erica Mitchell, Municipal Transportation Agency
David Chan, Appellant

Action: Cancel any current examination and eligibility status; No future employment with the City and County of San Francisco. (Vote of 4 to 0)

0027-07-6 Appeal by Virginia Morgan of the Human Resources Director's decision to dismiss her charge of discrimination. (Item No. 9)

August 20, 2007: Postpone to the meeting of October 1, 2007 at the request of Matthew Ming, Attorney for Virginia Morgan.

October 1, 2007: Postpone to the meeting of November 19, 2007 at the request of the Department of Human Resources and concurrence of Matthew Ming, Attorney for the appellant.

Note: Commissioners Morgan Gorrano and Yu-Yee Wu addressed their concerns regarding the City Attorney's Opinion on remedies available to the Commission on discrimination complaints.

November 19, 2007: Postpone to the meeting of January 7, 2008 pending the City Attorney's Opinion on remedies available to the Commission on discrimination complaints and having all Commissioners present.

August 17, 2009: Postpone to the meeting of September 21, 2009 by mutual agreement of the Department of Human Resources and Operating Engineers Local 3.

Speakers: None.

Action: Postpone to the meeting of October 19, 2009 at the request of the Department of Human Resources. (Vote of 4 to 0)

0296-09-1 Annual Report on the Certification of Eligibles – Entry and Promotion – Uniformed Ranks of Police and Fire. (Item No. 10)

Speakers: Jesusa Bushong, San Francisco Fire Department
Micki Callahan, Human Resources Director

Action: Accept and file the report. (Vote of 4 to 0)

0284-09-3 Certification of the Highest Prevailing Rate of Wages of the Various Crafts and Kinds of Labor Paid in Private Employment in the City and County of San Francisco. (Item No. 11)

Speakers: None.

Action: Adopt the report; Forward to Board of Supervisors. (Vote of 4 to 0)

0024-09-8 Report from the Human Services Agency on the status of the conditional approval of personal services contract numbers 2000-08/09; 2001-08/09; 2004-08/09 and 2007-08/09 through 2009-08/09. (Item No. 12)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
2000-08/09	Human Services Agency	\$7,500,000	Will provide orientations, induction training, home studies and post-adoption services to the families, and facilitating the matching of adoptive families to San Francisco children in the foster care system.	Continuing	06/30/14
2001-08/09	Human Services Agency	\$65,000,000	Will provide training, respite care, counseling, crisis intervention, childcare and reunification efforts to help maintain foster children in their communities.	Continuing	06/30/14
2004-08/09	Human Services Agency	\$230,000,000	Will provide supportive housing services including case management, money management and tenant support to individuals and families living in shelters, single resident occupancy hotels and transitional or permanent housing.	Continuing	06/30/14
2007-08/09	Human Services Agency	\$327,750,000	Will provide a central registry, enrollment in a comprehensive health benefit system, advocacy and support services for 16,000 homecare workers. Provides the contract mode IHSS as mandated.	Continuing	06/30/14
2008-08/09	Human Services Agency	\$75,750,000	Will provide homeless individuals and families with emergency shelter services and meals. Service may include sleeping facilities (bed, bedding and storage space), meals/groceries, laundry facilities and voluntary case management.	Continuing	06/30/14
2009-08/09	Human Services Agency	\$14,950,000	Will provide individuals and families who are homeless or at-risk for homelessness with drop-in access to services, shelter bed reservations and respite from the streets.	Continuing	06/30/14

February 2, 2009: Postpone PSC #2000-08/09 through 2009-08/09 to the meeting of March 2, 2009 at the request of SEIU Local 1021.

- March 2, 2009: Adopt the Human Resources Director's report on PSC #2000-08/09; 2001-08/09; 2004-08/09 and 2007-08/09 through 2009-08/09 on the condition that: 1) IFPTE Local 21 and the Human Services Agency meet to discuss their concerns regarding funding options for the transition of work performed by Class 2819 and 2822 Health Educators and Assistant Health Educators back to the City, in conjunction with the Department of Public Health; 2) a written report on the progress submitted to the Civil Service Commission no later than six (6) months (September 7, 2009) and 3) Human Services Agency continue to meet and discuss in good faith with IFPTE Local 21 other classifications, the work of which could possibly be transitioned back to the City. Notify the offices of the Controller and the Purchaser. (Vote of 5 to 0)
- Speakers:** Dave Curto, Human Services Agency
Steve Pitocchi, SEIU Local 1021
- Action:** Accept the oral report. (Vote of 4 to 0)
- 0555-08-3 Appeal by Nora Hanson, Transit Operator (Job Code 9163) of her battery pay determination. (Item No. 13)**
- July 20, 2009: Postpone to the meeting of September 21, 2009 at the request of Nora Hanson.
- Speakers:** Sharon Van Loon, Municipal Transportation Agency
Nora Hanson, Appellant
- Action:** Deny the request by Nora Hanson to postpone to the meeting of October 5, 2009. (Vote of 4 to 0)
- Grant the appeal by Nora Hanson and award battery pay as authorized by Section 16.170 of the Administrative Code. (Vote of 4 to 0)
- 0332-08-6 Appeal by Edward Campos of the Human Resources Director's finding of insufficient evidence to support his discrimination, harassment and retaliation complaints. (Item No. 14)**
- August 3, 2009: Postpone to the meeting of September 21, 2009 at the request of Edward Campos.
- Speakers:** None.
- Action:** Postpone to the meeting of October 5, 2009 at the request of Edward Campos. The Commission stipulated this will be the last continuance granted. (Vote of 4 to 0)
- 0650-06-6 Appeal by Micki Jones of the Human Resources Director's finding of insufficient evidence to support her complaint of retaliation. (Item No. 15)**
- Speakers:** Janie White, Department of Human Resources
Micki Jones, Appellant
- Action:** Adopt the report. Sustain the decision of the Human Resources Director; deny the appeal by Micki Jones. (Vote of 3 to 1; Commissioner Boatwright *dissents*.)
- 0263-09-2 Appeal by IFPTE Local 21 of Classification Action #20, FY 08-09 Related to Amending the Job Specifications of the 6230 and 6231 Street Inspector Classifications. (Item No. 16)**
- Speakers:** None.
- Action:** Postpone to the meeting of October 5, 2009 at the request of IFPTE Local 21. The Commission stipulated this will be the last continuance granted. (Vote of 4 to 0)
- 0297-09-1 Department of Human Resources' Report on the Position-Based Testing Program. (Item No. 17)**
- Speakers:** Laura Dancer, Department of Human Resources
- Action:** Accept and file the report. (Vote of 4 to 0)
- 0298-09-1 Department of Human Resources Report on Provisional Appointments. (Item No. 18)**
- Speakers:** Laura Dancer, Department of Human Resources
- Action:** Accept and file the report. (Vote of 4 to 0)

REQUEST TO SPEAK ON ANY MATTER WITHIN THE JURISDICTION OF THE CIVIL SERVICE COMMISSION (Item No. 19)

Kevin Hughes, IBEW Local 6 requested a copy of the Report on the Position-Based Testing Program. He also made brief comments on unpaid administrative leave, the California Public Utilities Commission considering proposed regulations regarding cell phone usage by transit operators and he thanked the Commissioners for their time and the great job they do on the issues and information with which they work.

COMMISSIONERS' ANNOUNCEMENTS/REQUESTS (Item No. 20)

None.

ADJOURNMENT (Item No. 21)

6:05 p.m.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE -- POL

Dept. Code: POL

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

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

Type of Service: Body Worn Camera Software as a Service

Funding Source: General Fund

PSC Duration: 5 years 13 weeks

PSC Amount: \$7,100,000

1. Description of Work

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

The Contractor will provide Information Technology (IT) and infrastructure consulting, detailed integration work among Software as a Service (SaaS) platform and law enforcement systems, high-touch troubleshooting and diagnostics, strategic guidance and support, implementations and implementation consulting, SaaS platform configurations, and initial train-the-trainer training for permanent civil service classifications.

The amount of the PSC includes all contract costs.

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

This service supports the San Francisco Police Department's Body Worn Camera program. Without these services, the department cannot have a Body Worn Camera program.

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

This is a new request. The current contract procured by the Office of Contract Administration in 2016 did not have a PSC.

D. Will the contract(s) be renewed?

Unknown at this time.

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

This contract supports the San Francisco Police Department's commitment to having a Body Worn Camera program. The Department policy is attached.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The vendor will provide proprietary systems and platforms require proprietary services that can only be provided directly from the vendor.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: IT and infrastructure consulting, detailed integration work, high-touch troubleshooting and diagnostics, and strategy guidance, implementations and implementation consulting, and initial train-the-trainer training for permanent civil service classifications.

B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal; 1095, IT Operations Support Admin V; 1095, IT Operations Support Administrator V;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, there will be periodical equipment refreshes and upgrades requiring current equipment possessed by the department to be replaced.

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

None. These are proprietary systems and platforms requiring proprietary services that can only be provided directly from the vendor.

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

- A. Explain why civil service classes are not applicable.
These proprietary systems and platforms require proprietary services that can only be provided directly from the vendor.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a civil service classification as these proprietary systems and platforms require proprietary services that can only be provided directly from the vendor.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. For new SaaS platform functionality, system administration, and end user equipment, the vendor will provide train-the-trainer training for permanent civil service classifications ranging from sworn officers, body worn camera redaction legal assistants to technology classifications including, but not limited to 109x, 106x, 105x, 104x series.
- 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 02/03/2022, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 1245 - 3rd Street, 6th Floor San Francisco, CA 94158

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44080 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of Genie.Wong@sfgov.org
To: [Wong, Genie \(POL\); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Wong, Genie \(POL\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Wong, Genie (POL); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Wong, Genie (POL); DHR-PSCCoordinator, DHR (HRD)@ifpte21.com)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44080 - 21/22
Date: Thursday, February 3, 2022 3:52:48 PM

RECEIPT for Union Notification for PSC 44080 - 21/22 more than \$100k

The POLICE -- POL has submitted a request for a Personal Services Contract (PSC) 44080 - 21/22 for \$7,100,000 for Initial Request services for the period 04/01/2022 – 06/30/2027. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/17917> 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)

Body Worn Cameras

10.11.01 PURPOSE

The use of Body Worn Cameras (BWC) is an effective tool a law enforcement agency can use to demonstrate its commitment to transparency, ensure the accountability of its members, increase the public's trust in officers, and protect its members from unjustified complaints of misconduct. As such, the San Francisco Police Department is committed to establishing a BWC program that reinforces its responsibility for protecting public and officer safety. The purpose of this Department General Order is to establish the policies and procedures governing the Department's BWC program and to ensure members' effective and rigorous use of BWC and adherence to the program.

The BWC is a small audio-video recorder with the singular purpose of recording audio/visual files, specifically designed to be mounted on a person. The BWC is designed to record audio and video activity to preserve evidence for use in criminal and administrative investigations (including disciplinary cases), civil litigation, officer performance evaluations, and to review police procedures and tactics, as appropriate. While recordings obtained from a BWC provide an objective record of the recorded events, it is understood that video recordings captured by a BWC (or any other recording device) provide a limited perspective and do not necessarily reflect the experience or state of mind of the individual member wearing the BWC in a given incident.

10.11.02 POLICY

- A. Use of Equipment** - The Department-issued BWC is authorized for use in the course and scope of official police duties as set forth in this Order. Only members authorized by the Chief of Police and trained in the use of BWCs are allowed to wear Department-issued BWCs. The BWC and all recorded data from the BWC are the property of the Department. The use of non-Department issued BWCs while on-duty is prohibited.
- B. Training** - Prior to the issuance of BWCs, officers will be trained on the operation and care of the BWCs. This training will include mandatory, permissible and prohibited uses, significant legal developments, and use of BWCs in medical facilities.
- C. Program Administrator** - The Risk Management Office (RMO) is the BWC's program administrator. The duties of the RMO include, but are not limited to:
 - 1. Tracking and maintaining BWC inventory
 - 2. Issuing and replacing BWCs to authorized members
 - 3. Granting security access to the computer server
 - 4. Monitoring retention timeframes as required by policy and law
 - 5. Complying with Public Record Act (PRA) requests and all court record requests
 - 6. Conducting periodic and random audits of BWC equipment and the computer server
 - 7. Conducting periodic and random audits of BWC recordings for members' compliance with the policy

10.11.03 PROCEDURES

- A. Set Up and Maintenance.** Members shall be responsible for the proper care and use of their assigned BWC and associated equipment.
1. Members shall test the equipment at the beginning of their shift and prior to deploying the BWC equipment to ensure it is working properly and is fully charged.
 2. Activate(s) or activated, means to initiate both the audio and visual recording function of the BWC. Operating the BWC in buffering mode or with the mute function is not activating the BWC. Members shall not utilize the BWC mute function. The Department reserves the right to disable the BWC mute function.
 3. Deactivate, deactivated, or deactivation means to disable the audio or visual function of the BWC. Turning off the lights/LEDs display on the BWC or adjusting the volume on the audio prompts is not considered a deactivation.
 4. If the member discovers a defect or that the equipment is malfunctioning, the member shall cease its use and shall promptly report the problem to their Platoon Commander or Officer-in-Charge.
 5. If the member discovers that the BWC is lost or stolen, the member shall submit a memorandum through the chain of command memorializing the circumstances, in accordance with Department General Order 2.01, Rule 24, Loss or Damage to Department Property.
 6. If the member's BWC is damaged, defective, lost or stolen, the member's supervisor shall facilitate a replacement BWC as soon as practical.
 7. Members shall attach the BWC in such a way to provide an unobstructed view of officer/members of the public contact. The BWCs shall be considered mounted correctly if it is mounted in one of the Department-approved mounting positions.
- B. Notification and Consent.** When feasible, members should inform individuals that they are being recorded.

However, state law allows members to record communications that the member could lawfully hear or record. Penal Code § 633 *see also People v. Lucero 190 Cal. App. 3d 1065, 1069.* Members are not required to obtain consent from members of the public prior to recording when the member is lawfully in the area where the recording takes place.

Members are not required to activate or deactivate a BWC upon the request of a member of the public. In addition, members are not required to play back BWC recordings to allow members of the public to review the video footage.

- C. Authorized Use.** All on-scene members equipped with a BWC shall activate their BWC equipment to record in the following circumstances:
1. Detentions and arrests
 2. Consensual encounters where the member suspects that the member of the public may have knowledge of criminal activity as a suspect, witness, or victim, except as noted in Section 10.11.03, D.
 3. 5150 evaluations
 4. Traffic and pedestrian stops
 5. Vehicle pursuits
 6. Foot pursuits
 7. Uses of force

8. When serving a search or arrest warrant
9. Conducting any of the following searches on one's person and/or property:
 - a. Incident to an arrest
 - b. Cursory
 - c. Probable cause
 - d. Probation/parole
 - e. Consent
 - f. Vehicles
10. Transportation of arrestees and detainees
11. During any encounter with a member of the public that becomes hostile
12. In any situation when the recording would be valuable for evidentiary purposes
13. Only in situations that serve a law enforcement purpose

Failure to activate a BWC as outlined in this order shall subject a member to an administrative investigation and, if warranted, appropriate discipline.

- D. Prohibited Recordings.** Members shall not activate the BWC when encountering:
1. Sexual assault and child abuse victims during a preliminary investigation
 2. Situations that could compromise the identity of confidential informants and undercover operatives
 3. Strip searches

However, a member may record in these circumstances if the member can articulate an exigent circumstance that required deviation from the normal rule in these situations.

Members shall not activate the BWC in a manner that is specifically prohibited by DGO 2.01, General Rules of Conduct, Rule 56 – Surreptitious Recordings – and DGO 8.10, Guidelines for First Amendment Activities.

E. Terminations of Recordings. Once the BWC has been activated, members shall continue using the BWC until their involvement in the event has concluded to ensure the integrity of the recording, unless the contact moves into an area restricted by this policy. Members shall deactivate the BWC in the following circumstances:

1. When discussing sensitive tactical or law enforcement information away from the member of the public
2. After receiving an order from a higher ranking member
3. When recording at a hospital would compromise patient confidentiality
4. When gathering information from witnesses or community members, and the officer has a reasonable and articulable concern that a BWC would inhibit information gathering efforts

In cases when a member deactivates a BWC, the member shall document the reason(s) for deactivation as outlined in Section 10.11.03, G, Documentation.

- F. Viewing BWC Recordings.** Members may not review a BWC recording unless one of two following situations applies:
1. Legitimate Investigatory Purpose. A member may review a BWC recording on their assigned device or on an authorized computer for any legitimate criminal or administrative investigatory purpose, including but not limited to, preparing an incident report, preparing statements, conducting a follow-up investigation, or

providing testimony. Members shall not access or view a BWC unless doing so involves a legitimate law enforcement purpose

2. Officer-Involved Shooting and In-Custody Death. Following any (1) officer-involved shooting; or (2) in-custody death; any subject officer shall be required to provide an initial statement before the member reviews their own BWC recording(s). Officers may not view any other member's BWC recording(s) or any other video(s) that may capture an officer-involved shooting or in-custody death.
 - a) Initial Statement. The initial statement by the subject officer shall briefly summarize the actions that the officer was engaged in, the actions that required the use of force, and the officer's response. The statement shall be distinct from the "public safety statement."
 - b) Viewing the BWC after the Initial Statement. After providing an initial statement, the subject officer shall have an opportunity to review their own BWC recording(s) depicting the incident (with their representative or attorney) prior to being subject to an interview.
3. Nothing in this section is intended to limit the Department of Police Accountability's (DPA) role in these investigations.

G. Documentation. Members submitting an incident report or completing a written statement shall indicate whether the BWC was activated and whether it captured footage related to the incident.

If a member deactivates a BWC recording prior to the conclusion of an event, the member shall document the reason(s) for terminating the recording in CAD, an incident report, a written statement or a memorandum.

If a higher ranking member orders a subordinate member to deactivate the BWC, the higher ranking officer shall document the reason(s) for the order in CAD, an incident report, a written statement or a memorandum.

If a member reactivates the BWC after turning the equipment off, the member shall document the reason(s) for restarting the recording in CAD, an incident report, a written statement or a memorandum.

If a member determines that officer or public safety would be compromised if a BWC were activated during an incident requiring its use, the member shall document in CAD, an incident report, a written statement or a memorandum the reason(s) for not using the BWC.

H. Storage and Use of Recordings

1. A member who has recorded an event shall upload the footage prior to the end of their watch unless instructed to do so sooner by an assigned investigator or a superior officer. If the member is 1) the subject of the investigation in an officer-involved shooting or in-custody death; 2) the subject of a criminal investigation; or 3) at the discretion of the Chief of Police or the Chief's designee, the senior ranking on-scene supervisor shall take immediate physical custody of the camera and take responsibility for uploading the data.
2. When uploading recordings to the computer server, members shall identify each BWC recording with the incident report number, CAD number or citation number

and the appropriate incident category title to ensure the recording is accurately retained and to comply with local, state and federal laws.

3. Members are prohibited from tampering with BWC recordings, accessing BWC recordings for personal use, and from uploading BWC recordings onto public or social media internet websites without written approval from the commanding officer of the RMO.

I. Duplication and Distribution

1. The San Francisco Police Department's goal is to release BWC recordings to the greatest extent possible unless disclosure would:
 - a. endanger the safety of a witness or another person involved in the investigation,
 - b. jeopardize the successful completion of an investigation, or
 - c. violate local, state and/or federal laws, including but not limited to, the right of privacy.
2. Departmental Requests
 - a. The officer-in-charge or commanding officer of the investigative unit assigned the incident recorded by the BWC, or the commanding officer of the RMO shall have the authority to permit the duplication and distribution of the BWC files.
 - b. Any member requesting to duplicate or distribute a BWC recording shall obtain prior written approval from the officer-in-charge or the commanding officer of the unit assigned the investigation, or the commanding officer of the RMO.
 - c. Duplication and distribution of BWC recordings are limited to those who have a "need to know" and a "right to know" and are for law enforcement purposes only. The Department shall maintain a log of access, duplication and distribution.
 - d. When releasing BWC recordings, members shall comply with federal, state and local statutes and Department policy.
3. Non-Departmental Requests:
 - a. The Department shall accept and process PRA requests in accordance with the provisions of federal, state and local statutes and Department policy.
 - b. Members shall provide discovery requests related to the rebooking process or other court proceedings by transferring the BWC recording to the requesting agency by using the computer server where the BWC recording is stored.
 - c. When requested by the DPA, members of the Legal Division shall provide the BWC recordings consistent with the Police Commission's document protocol policy on DPA routine requests.

J. Retention

1. Consistent with state law, the Department shall retain all BWC recordings for a minimum of sixty (60) days, after which recordings may be erased, destroyed or recycled.

Notwithstanding any other provision of this policy, the Department shall retain BWC recordings for a minimum of two (2) years if:

- a. The recording is of an incident involving a member's use of force or officer-involved shooting; or
- b. The recording is of an incident that leads to the detention or arrest of an individual; or
- c. The recording is relevant to a formal or informal complaint against a member or the Department.

2. Notwithstanding any other provision of this policy, a BWC recording may be saved for a longer or indefinite period of time as part of a specific case if deemed relevant to a criminal, civil or administrative matter.
3. A member may not delete any BWC recording without prior authorization. The member seeking to delete a recording shall submit a memorandum to their Commanding Officer requesting to delete footage from a BWC file and shall make an entry of the request in the appropriate case file, if applicable. The Commanding Officer shall then forward the memorandum to the Commanding Officer of the RMO for evaluation and appropriate action.
4. Subject to the above limitations, members of the RMO are authorized to delete BWC recordings in accordance with the Department's established retention policies on BWC recordings or when directed by the Commanding Officer of the RMO.
5. The Department shall retain permanently all records of logs of access as set forth in I.2.C and deletion of data including memorandums as set forth in J.3 and J.4 from the BWC.

K. Accidental or Unintentional Recordings. If a BWC accidentally or inadvertently captures an unintended recording, the member may submit a memorandum through the chain of command specifying the date, time, location and a summary of the unintentionally recorded event. This memorandum shall be forwarded to the Commanding Officer of the RMO for evaluation and appropriate action.

L. Discovery of Potential Misconduct during Authorized Review. Members reviewing recordings should remain focused on the incident captured in the BWC and should review only those recordings relevant to the investigative scope. If a member discovers potential misconduct during any review of the BWC, the member shall report the potential misconduct to a superior officer. The superior officer shall adhere to the provisions of Department General Order 1.06, Duties of Superior Officers, Section 10.11.03.I.A.4. Nothing in this procedure prohibits addressing Department policy violations.

M. Targeting Prohibited. Department supervisors may access BWC footage for purposes consistent with the policy. Supervisors may not review an officer's BWC footage to search for violations of Department policy without cause.

References

DGO 1.06, Duties of Superior Officers

DGO 2.01, Rules 23 and 24, Use of Department Property and Loss or Damage to Department Property

DGO 2.01, Rule 56, Surreptitious Recordings

DGO 8.10, Guidelines for First Amendment Activities

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: Wastewater Capital Improvement Plan Program Management Support Services

Funding Source: Wastewater Enterprise Revenue and Revenue PSC Duration: 10 years 2 days

PSC Amount: \$90,000,000

1. Description of Work

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

The SFPUC Infrastructure Division and Wastewater Enterprise (WWE) seeks consultant services to provide specialized program management support for the Wastewater Capital Improvement Plan. These services are required to continue a number of programmatic functions such as strategic capital planning, risk management, pre-construction technical advice, pre-construction planning and management, labor and contract relations, development and refinement of standards, preparation of programmatic schedules and budgets, analysis of alternative project delivery mechanisms and asset management.

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

SFPUC is seeking the services of an experienced firm to assist with the delivery of the remaining Sewer System Improvement Program (which started in 2012 and will continue through at least 2032), and to provide further support to the additional capital work in the larger, more comprehensive rolling WWE CIP. The WWE Capital Plan is an investment to upgrade San Francisco's seismically vulnerable combined wastewater system. The 100-year-old system, which treats sanitary sewage and stormwater, is past its useful life and facing a number of current and future challenges resulting from extreme weather and seismic vulnerabilities. The improvements include upgrading and replacing critical grey infrastructure (treatment facilities, pump stations, and the collection system) and integrating green infrastructure, which uses natural processes to slow down and filter stormwater to prevent it from overwhelming the system and minimize flooding during rainstorms. The work under this contract will continue upgrades to the wastewater system to ensure it is compliant, reliable, resilient, and flexible in responding to catastrophic events while protecting the environment and public health. If this contract is denied, these critical improvements will be delayed causing the system to be out of regulatory compliance and at risk for failure.

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, similar services were provided under CS-165, which is nearing the end of the contract, and served to initiate the majority of the SSIP Phase 1 work. However, this contract intends to cover the remaining SSIP work and the larger WWE CIP, of which the SSIP is one of three CIP programs to be supported under this contract.

D. Will the contract(s) be renewed?

No

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

The Wastewater Capital Improvement Plan is a continued system-wide investment that includes replacing major treatment facilities and improving critical assets throughout San Francisco. The original agreement, CS-165 Program Management Support Services - Sewer System Improvement Program, a multi-billion-dollar agreement spanning over a decade, was awarded for up to fifteen years (June 2011-September 2026). However, the work has accelerated, and the contract is anticipated to reach capacity in 2022. The new agreement, PRO.0179 (Wastewater Capital Improvement Plan Delivery), will continue the work implemented under the SSIP and initiate new capital improvement projects as part of a rolling Ten-Year capital plan. This work will include prioritized SSIP projects (initially identified in later phases) and other WWE Capital Programs (Facilities & Infrastructure and Renewal & Replacement) projects. The new agreement will match the ten-year duration of the current Ten-Year capital plan. If approved, midway through the contract, the lead of this proposed work will present an update to the Civil Service Commission on the Program's progress.

2. Reason(s) for the Request

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

- B. Explain the qualifying circumstances:

The WWE Capital Improvement Plan requires the support of Consultants with extensive knowledge, experience, and expertise in providing Program Management, Planning, Design, and Pre-Construction support services for large water or wastewater infrastructure capital programs. Service may be required on an as-needed, intermittent, or periodic basis over the Ten-Year capital plan due to peaks in workload to deliver multiple projects simultaneously.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The support necessary to deliver a multi-billion-dollar capital improvement program requires extensive experience in capital planning, delivery, and asset management. Expertise in trenchless linear pipeline construction, stormwater management, green infrastructure, watershed assessments, and alternative delivery methods (e.g., Design-Build and CM at Risk) is required. An understanding of wastewater regulatory and combined sewer system requirements is imperative. In-depth knowledge of the wastewater treatment process and existing/emerging technologies is essential. Expertise in combined sewer systems analyses, evaluations, permitting, operating strategies, planning, design, and construction is preferred. Experience in wastewater facility plant start-up and commissioning is also necessary. Knowledge in cost estimating, engineering, and controls for treatment plants, collection system facilities, including gravity sewers (circular and irregular cross-sections up to 109" diameter), interceptors, tunnels, outfall structures, and pump station projects, is necessary. Moreover, specialists in the following areas are required. Value engineering and alternative analysis; A recognized expert in climate change with Bay Area familiarity to support climate change analysis' and adaptation plans; Technology transfer and training specialist for wastewater and stormwater pump stations, treatment plants, and conveyance systems; Asset management integration specialist with experience in integrating wastewater infrastructure; Building Information Modeling (BIM) specialist with engineering/construction experience on wastewater projects, including expertise in BIM for wastewater and stormwater pump stations, treatment plants, and conveyance systems.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5506, Project Manager 3; 5508, Project Manager 4;
- 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?

SFPUC Engineering Management Bureau (EMB) and San Francisco Public Works (SFPW) were approached about this work. It was determined that San Francisco City staff with relevant experience, including Public Works, will be given the first offer to provide technical services for this contract. If SFPUC cannot perform the services in-house, SFPW will be given the first right of refusal for project technical support tasks before acquiring consultant support. We intend to prioritize work for City staff where possible. Thus, we have designated several technical subtasks as “optional,” which allows flexibility to assign the work as needed.

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

- A. Explain why civil service classes are not applicable.
In some cases, Civil Service classifications are applicable, but in those that are not, it is due to the required technical expertise necessary to deliver a program of this complexity and magnitude. The City does not routinely implement multi-billion-dollar capital improvement programs for the combined sewer system. This work happens approximately every 40 years and currently has an approved capital budget of \$5.4B over ten years.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It is impractical to adopt a new civil service class to perform this work due to the highly specialized nature and as-needed schedule. In addition, the required specialized services are not usually necessary for project delivery. Thus, hiring individuals for these technical areas is not feasible.

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.
Yes. Under this contract, the consultant will work with SFPUC to identify knowledge gaps associated with the implementation of CIP projects and develop/deliver competency-based training programs and curriculums for projects accordingly. Training areas may include low-impact design, asset management, specialized hydraulic modeling, pump station upgrades, program controls, program management, or other project areas that could be designed by 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 12/16/2021, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42154 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@swater.org
To: Hale, Shawndrea M.; [Laxamana, Junko \(BOS\)](mailto:Laxamana, Junko (BOS)); WendyWong26@yahoo.com; wendywong26@yahoo.com;
tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org;
L21PSCReview@ifpte21.org; Hale, Shawndrea M.; dhr-psccordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 42154 - 21/22
Date: Thursday, December 16, 2021 9:32:54 AM

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

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

RECEIPT for Union Notification for PSC 42154 - 21/22 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42154 - 21/22 for \$90,000,000 for Initial Request services for the period 09/01/2022 – 08/31/2032. 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/17711> 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)

March 14, 2022

Stephen Robinson, Wastewater Enterprise Capital Program Director
San Francisco Public Utilities Commission
525 Golden Gate Avenue, 9th Floor
San Francisco, CA 94102

Subject: PRO.0104 WWE Capital Plan Delivery | PSC 42154 – 21/22

The SFPUC Infrastructure Division and Wastewater Enterprise (WWE) seeks consultant services to provide specialized program management support for the Wastewater Capital Improvement Plan. These services are required to continue a number of programmatic functions such as strategic capital planning, risk management, pre-construction technical advice, pre-construction planning and management, labor and contract relations, development and refinement of standards, preparation of programmatic schedules and budgets, analysis of alternative project delivery mechanisms and asset management. The work under this contract will continue upgrades to the wastewater system to ensure it is compliant, reliable, resilient, and flexible in responding to catastrophic events while protecting the environment and public health. If this contract is denied, these critical improvements will be delayed causing the system to be out of regulatory compliance and at risk for failure. If the contract is delayed, capital planning and high-level program implementation would ultimately slow down due to lack of resources.

This Personal Services Contract Summary (PSC) was posted on December 20, 2021, for L21 review, in anticipation of the March 7, 2022, Civil Service Committee (CSC) meeting. On December 21, SFPUC received L21's objection to the referenced PSC. On January 10, 2022, a list of discussion items was received in advance of a meeting with representatives from L21 on January 28. SFPUC then received a request on February 10 for additional information on the scope of services for this contract, to which SFPUC responded on February 18. On March 2, a negotiation position was submitted by L21 and a meeting to discuss these new terms was scheduled for March 15. SFPUC anticipates these conversations to be ongoing. Thus, for all the reasons outlined above, the SFPUC seeks to proceed with the procurement process, and is asking for approval from Civil Service while the union and the SFPUC agree to continue their ongoing discussions and proposals.

Sincerely,



Stephen Robinson
Wastewater Enterprise Capital Program Director

OUR MISSION: To provide our customers with high-quality, efficient and reliable water, power and sewer services in a manner that values environmental and community interests and sustains the resources entrusted to our care.

London N. Breed
Mayor

Anson Moran
President

Newsha Ajami
Vice President

Sophie Maxwell
Commissioner

Tim Paulson
Commissioner

Dennis J. Herrera
General Manager





CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

MINUTES
Regular Meeting
April 18, 2011

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

E. DENNIS NORMANDY
PRESIDENT

DONALD A. CASPER
VICE PRESIDENT

MORGAN R. GORRONO
COMMISSIONER

MARY Y. JUNG
COMMISSIONER

LISA SEITZ GRUWELL
COMMISSIONER

ANITA SANCHEZ
EXECUTIVE OFFICER

CALL TO ORDER

2:06 p.m.

ROLL CALL

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

President E. Dennis Normandy presided.

REQUEST TO SPEAK ON ANY MATTER WITHIN THE JURISDICTION OF THE CIVIL SERVICE COMMISSION AND WHICH IS NOT APPEARING ON TODAY'S AGENDA

None.

APPROVAL OF MINUTES

Regular Meeting of April 4, 2011

Action: Postpone to the meeting of May 2, 2011; the draft minutes are incomplete due to tape recording malfunction. (Vote of 4 to 0)

HUMAN RESOURCES DIRECTOR'S REPORT (Item No. 5)

Micki Callahan, Human Resources Director reported that today, April 18, 2011, the Department of Human Resources began a classification project to review the allocation of classes. A short-term Employee Specialist has been hired to assist with this project. A full report will be presented at an upcoming meeting.

EXECUTIVE OFFICER'S REPORT (Item No. 6)

No report.

**0075-11-8 Review of request for approval of proposed personal services contract.
(Item No. 7)**

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4092-10/11	Public Utilities Commission	\$1,500,000	Licensing fees, software upgrade and technical support service for Distributed Control System (DCS) system for Wastewater Enterprise (WWE).	Regular	06/30/13

March 21, 2011: Postpone PSC #4092-10/11 to the meeting of April 18, 2011 at the request of the Public Utilities Commission.

Speakers: Jignesh DeSai and Tamerat Awetu, Public Utilities Commission and Ging Louie, IFPTE Local 21

Action: Adopt the report; Approve request for PSC #4092-10/11 on the condition that the duration is two (2) years, ending in 2013; the Public Utilities Commission will continue to monitor to identify work within the scope of the contract that can be performed by civil service employees; and the Public Utilities Commission and IFPTE Local 21 to report back to the Commission on the progress in six (6) months. Notify the Office of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

**0100-11-8 Review of request for approval of proposed personal services contracts.
(Item No. 8)**

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4097-10/11	Airport Commission	\$1,800,000	This project will develop a geodetic control, imagery control, project survey and quality control plan; conduct an aeronautical survey, which will also supplement the aerial survey requirement for the Runway Safety Area project; complete an airspace analysis, obstruction survey, and boundary survey; capture, convert and upload plain metric into the FAA AGIS to obtain approval by the National Geodetic Survey (NGS), and the FAA, and to coordinate and present an electronic Airport Layout Plan. Proposed work must be completed according to the FAA Advisory Circulars 150/5300-16, -17, and -18.	Regular	06/30/15
4098-10/11	Airport Commission	\$2,800,000	The proposed work includes specialty design and inspection pertaining to the Federal Aviation Administration's (FAA) navigational-aids systems, runway design and construction specific to the Runway Safety Area (RSA), project financial analyses, and development of a master project schedule as support for the RSA program.	Regular	12/31/15
4099-10/11	Airport Commission	\$8,500,000	Design, develop, install and implement an integrated solution for managing ground transportation information from Radio Frequency Identification (RFID) transponders and smart-card taxi revenue collection system at the Airport. Work includes software development, integration of current RFID readers and taxi smart-card system into new system, testing and integration of hand-held RFID readers, training for staff and on-going maintenance.	Regular	04/19/14

Civil Service Commission Meeting Minutes

Regular Meeting of April 18, 2011

<p>4100-10/11</p> <p><i>Appealed by IFPTE Local 21 on Regular Agenda</i></p> <p><i>See Item 12</i></p>	<p>Public Utilities Commission</p>	<p>\$150,000,000</p>	<p>Provide specialized expertise for the Sewer System Improvement Program as a Program Advisor in the areas of: technology, program validation, climate change, facilities integration, cost and schedule, risk management, emerging technologies, preliminary design, pre-construction, and triple bottom line analysis.</p>	<p>Regular</p>	<p>12/01/26</p>
<p>4068-08/09</p>	<p>Airport Commission</p>	<p>Increase Amount \$450,000 New Amount \$950,000</p>	<p>SFO needs support of consultant on the Noise Insulation Program, particularly on tasks such as: review of County records & updated noise impact boundaries to identify properties that may qualify for noise insulation improvements; coordination of aircraft noise easement acquisition & recording; coordination of noise insulation design & construction work; handling of inquires from property owners regarding eligibility for noise insulation improvements funded by the FAA and the Airport; and, preparation of outlay reports for grant reimbursements. The budget for the 3-yr period was increased to \$950,000 since FAA awarded additional grants, allowing Airport to increase the scope of work and provide acoustic treatment to a larger number of properties than originally planned.</p>	<p>Modification</p>	<p>12/21/11</p>
<p>4119-07/08</p>	<p>Port Commission</p>	<p>Increase Amount \$380,000 New Amount \$1,730,000</p>	<p>The contracted scope of work with Treadwell & Rollo is approximately 90% complete. Regional Water Quality Control Board (Water Board) has accepted/approved the environmental investigation. However, as a result of the findings presented in the investigation report, Water Board now requires the Port to undertake two (2) new tasks; prepare a Remedial Action Plan for the Pier 70 area; and conduct a Feasibility Study for contaminated sediment at a portion of Pier 70 area designated for future park</p>	<p>Modification</p>	<p>06/30/12</p>
<p>4028-06/07</p>	<p>Public Library</p>	<p>Increase Amount \$0 New Amount \$1,050,000</p>	<p>The San Francisco Public Library (Library) seeks a Contractor to develop a program to interpret and coordinate data, design form format, and issue notices and forms for the Library in multiple languages. The services include transforming electronic data, via File Transfer Protocol (FTP) to generate around 1,000 library notices per day, printing text of notices onto designated forms, and mailing them to library patrons first class presorted on the same day. Initially, the Contractor and Library staff will meet to define the specifications for and design each of the required forms: reserves, overdue, billed items, holds expired, and holds cancelled. Subsequent changes and/or additions to the forms would be made as needed and, on occasion, the Library would provide additional inserts, or camera-ready copy of same, to be included in the mailings.</p>	<p>Modification</p>	<p>06/30/15</p>

4087-07/08	Public Works	Increase Amount \$8,400,000 New Amount \$16,400,000	The Executive Construction Management (ECM) for the new hospital at SFGH Medical Center will be responsible for pre-construction and construction services, and for establishing and maintaining overall project controls during the design and construction phases of the SFGH Rebuild Project. ECM services include project scheduling, cost estimating, and establishing an automated project master database for tracking and monitoring daily workflow processing and reporting. The ECM will also be responsible for the development and maintenance of a Project Controls System that is independent of the Construction Manager/General Contractor's (CM/GC) Project Controls System. The ECM will be responsible for the monitoring of the CM/GC's quality assurance, safety programs, and hazardous material and construction mitigation controls. The selected ECM will provide specialized expertise to supplement Civil Service classifications and will be managed by City staff. The PSC modification request of \$8.4M is a reconciliation of the ECM's work scope and responsibilities between the 2007 forecasted utilization versus 2010 actual utilization trends due to restructured responsibilities. The revised PSC modification reflects an increased involvement by the ECM during the Pre-Construction and Construction Phases of the SFGH Rebuild Project, as well as extended durations. Some of the tasks include a full-time presence of the ECM cost engineer in validating work release work scopes and CM/GC cost reports, full-time schedule analysis and updates, full-time development and participation of the constructability review process, and development and maintenance of the Project Controls System. See attached document titled "Presentation to Board of Supervisors, Request for Contract Modification Approval Exceeding \$10M" for a more detailed discussion of the ECM's revised contract scope and a comparison of the 2007 forecasted utilization versus the 2010 actual utilization trend.	Modi- fication	12/31/16
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Speakers:

Cynthia Avakian and Josephine Pofsky, Airport Commission spoke on PSC #4097-10/11.
 Cynthia Avakian and Jim Chiu, Airport Commission spoke on PSC #4098-10/11.
 Cynthia Avakian and Gerardo Fries, Airport Commission spoke on PSC #4099-10/11.
 Brian Bannon, San Francisco Public Library spoke on PSC #4028-06/07.

Action:

- (1) Adopt the report as verbally amended from Yes to No in "D" of PSC #4028-06/07. Previous increase amount request of \$940,000 is reduced to \$300,000 with new amount of \$1,050,000. Duration of February 28, 2012 (3/7/11 CSC action) extended to 6/30/15. Approve request. Notify the Office of the Controller and the Office of Contract Administration. (Vote of 4 to 0)
- (2) Adopt the report; Approve request on all remaining contracts. Notify the Office of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0099-11-3 Salary Survey for Registered Nurse Classifications (Charter Section A8.403), 2011-2012. (Item No. 9)

Speakers: David Rich, Department of Human Resources

Action: Adopt the report; Certify to the Board of Supervisors for the Acute Care Nursing Classifications the highest prevailing salary schedules in the six Bay Area Counties (Public & Private) in effect on April 15, 2011. (Vote of 4 to 0)

0054-11-3 Appeal by Patrick Tobin of the Executive Officer’s denial to process his request for a hearing of the denial of his “Like Work-Like Pay” compensation as an acting Lieutenant at the San Francisco Police Department Traffic Company. (Item No. 10)

March 21, 2011: Postpone to the meeting of April 18, 2011 at the request of Sergeant Patrick Tobin.

Speakers: None.

Action: Postpone to the meeting of May 2, 2011 at the request of Russell Robinson, Attorney. (Vote of 4 to 0)

0101-11-8 Review of request for approval of proposed personal services contract. (Item No. 11)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4041-07/08	Public Utilities Commission	\$0	Work plan preparation; environmental document scoping; environmental field studies; alternatives analysis; preparation of draft environmental documents and permit applications; preparation of final environmental documents required for the acquisition of regulatory permits and agency approvals. The existing Geary Road Bridge provides passage across Alameda Creek to pedestrians, emergency service vehicles, and San Francisco Public Utilities Commission (SFPUC) and other agency staff. The existing wooden bridge is 80 years old and requires replacement to mitigate ongoing safety concerns, such as insufficient load capacity to allow passage of heavy vehicles like fire trucks. Implementation of the Geary Road Bridge Replacement Project (formerly called the New Diversion Dam Road Bridge Upgrade Project) would replace the existing bridge with one that meets current bridge design and safety standards, including passage of heavy vehicles. This required extension of the period of contract performance is necessary due to delays in the finalization of bridge design which has slowed the initiation of environmental review. If the extension of the period of contract services is denied, completion of the required environmental analysis will be delayed, along with the completion of this important safety improvement project.	Regular	12/01/12

0101-11-8 (continued)

Speakers: None.

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

0107-11-8 Appeal by IFPTE Local 21 of PSC #4100-10/11 from the Public Utilities Commission. (Item No. 12)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4100-10/11	Public Utilities Commission	\$150,000,000	Provide specialized expertise for the Sewer System Improvement Program as a Program Advisor in the areas of: technology, program validation, climate change, facilities integration, cost and schedule, risk management, emerging technologies, preliminary design, pre-construction and triple bottom line analysis.	Regular	12/01/26

Speakers: Harlan L. Kelly Jr., Public Utilities Commission
Larry Wong, IFPTE Local 21 and Joe Brenner, IFPTE Local 21

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

0013-11-6 Appeal by Robert Gage of the Executive Officer's decision to close his appeal due to untimeliness. (Item No. 13)

Speakers: Anita Sanchez, Executive Officer
Robert Gage, Appellant
Silvia Castellanos, Department of Human Resources
Linda Simon, Department of Human Resources

Action: Grant the appeal by Robert Gage of the Executive Officer's decision to close his appeal. Schedule the hearing of the appeal of Mr. Gage to the meeting of May 16, 2011, with the proviso that should Mr. Gage not appear, his appeal is denied. (Vote of 4 to 0)

0102-11-3 **Annual Adjustment (3rd Year of 5-Year Cycle) of Salary of Member, Board of Supervisors in accordance with Civil Service Commission action of May 4, 2009; and, Salaries (5th Year of 5-Year Cycle) of Elected Officials (Mayor, City Attorney, District Attorney, Public Defender, Assessor-Recorder, Treasurer, and Sheriff) in accordance with Charter Section A8.409-1 for Fiscal Year 2011-12. (Item No. 14)**

Speakers: Luz Morganti, Civil Service Commission

Action: Accept the report; Due to a 1.5% CPI-U change, salaries of the elected officials (Mayor, City Attorney, District Attorney, Public Defender, Assessor-Recorder, Treasurer, and Sheriff) are increased 1.5%, in accordance with Charter Section A8.409-1 and the salary of members of the Board of Supervisors is increased 1.5%, in accordance with Commission Action of May 4, 2009 for Fiscal Year 2011-12. (Vote of 4 to 0)

0103-11-3 **Consideration of Reduction of Salary of Member, Board of Supervisors pursuant to Charter Section 2.100 and Salaries of Elected Officials (Mayor, City Attorney, District Attorney, Public Defender, Assessor-Recorder, Treasurer, and Sheriff) pursuant to Charter Section A8.409-1 for Fiscal Year 2011-12. (Item No. 15)**

Speakers: Luz Morganti, Civil Service Commission

Action: Accept the report; Adopt the Department of Human Resources Employee Relations Director report, Overview of FY 2011-12 Labor Concessions; Use the weighted average of 4.16% made by employee organizations; Reduce 4.16% the salaries for Member, Board of Supervisors and Elected Officials (Mayor, City Attorney, District Attorney, Public Defender, Assessor-Recorder, Treasurer, and Sheriff) for Fiscal Year 2011-12 covering the period July 1, 2011 to June 30, 2012; and, Transmit to the Controller. (Vote of 4 to 0)

COMMISSIONERS' ANNOUNCEMENTS/REQUESTS (Item No. 16)

Commissioner Morgan R. Gorrone requested that the meeting be adjourned in memory of Captain Sidney H. Keil, U.S. Navy Retired.

Vice President Donald A. Casper referenced Civil Service Commission Rule 314.7.2 in requesting a report on how Limited Tenure appointments are made in the San Francisco Fire Department.

President E. Dennis Normandy updated Commissioner Gorrone who was absent at the previous meeting of the Commission's direction to the Executive Officer to explore the possibility of obtaining a certain percentage of the budget of departments with matters before the Civil Service Commission.

ADJOURNMENT (Item No. 17)

3:56 p.m.

At the request of Commissioner Morgan R. Gorrone, the meeting adjourned in memory of Captain Sidney H. Keil, U.S. Navy Retired who passed away on March 31, 2011. The Commission directed the Executive Officer to forward expressions of condolence to the family on behalf of the Commission.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Power Scheduling Coordination and Related Support Services

Funding Source: Energy Services/Wheeling Changes

PSC Duration: 5 years

PSC Amount: \$136,500,000

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) requires Scheduling Coordinator (SC) Services provided to the Hetch Hetchy (HHP) and CleanPowerSF energy portfolios for participation in the California Independent System Operator (CAISO) energy markets. The SC will assist the SFPUC and both energy portfolios in optimizing its short-term resource utilization and service to its loads, including but not limited to submittal of Day Ahead and Real Time generation, load, and interchange schedules, submitting bids, submitting energy trades, managing communications between CAISO, SFPUC schedulers, and Power House Operators, handling settlements, and other related services. The CAISO high and low voltage wheeling charges are required to be paid through SFPUC's contracted Scheduling Coordinator (SC) such that these charges can be paid to support our energy transmission from Hetch Hetchy system to San Francisco customers. CAISO's tariffs define these charges as a type of "pass-through charge" that SC will pay the charge to CAISO on the behalf of the SC client (e.g. SFPUC) without any additional fee for the pass-through charge. The CAISO settlement charges are paid on behalf of SFPUC and in accordance to the CAISO Payments Calendar. The breakdown of charges are as follows: \$6,000,000 for the contract costs and \$130,500,000 for the CAISO pass-through charges.

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

In order for the SFPUC to provide service to its electric customers, it must wheel electric power over the transmission system that is controlled by the CAISO, pursuant to a state law enacted in 1996. The CAISO tariff requires that only entities that have been certified as Scheduling Coordinators may interact with the CAISO to schedule all power that is transported or wheeled over the transmission system. The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

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

Yes, this service is currently being provided via PSC No. 45401-13/14 (CS-344). The department determined that a new Request for Proposal (RFP) will be issued for scheduling coordinator services. The PSC No. 47781 - 2021 (PRO.0152) was approved by the Civil Service Commission (CSC) on 3/1/2021. The issuance of the RFP was delayed due to complexity of the RFP, the COVID-19 pandemic and the resulting Shelter-in-Place order, requiring the department to seek CSC approval again, as the contract was not executed within a year of CSC approval.

D. Will the contract(s) be renewed?

No

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

The duration of this Personal Service Contract authority is in excess of five years in order to assist the SFPUC with power trading services to optimize the SFPUC's short-term resource utilization and service to its loads. In addition, the SFPUC is obligated to follow the CAISO's tariff for 24x7 operations for on-going longer term support regulated by State, resulting in a multiple-year agreement.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Detailed knowledge of CAISO scheduling and settlements, markets, and CAISO charge codes; substantial experience providing scheduling coordination services; knowledge of municipal utilities and hydroelectric operations and maintenance practices.

B. Which, if any, civil service class(es) normally perform(s) this work? 5602, Utility Specialist;

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

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

None because SFPUC is not a certified Scheduling Coordinator.

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

A. Explain why civil service classes are not applicable.

The 5602 (Utility Specialists) class provides energy trading, energy scheduling, and complex procurement planning analysis. However, this class does not currently have the specialized expertise to meet new requirements for advanced power scheduling, trading and related support services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Civil service class 5602 already exists.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. The contractor will provide SFPUC staff (including management, utility specialists and utility analysts) with training to provide continuity of business services, enhanced trading and scheduling capabilities, and market value assessment. The contractor will provide on-going support and training to SFPUC staff in the Power Purchasing & Scheduling, Settlements, and Strategic Planning groups of changing electricity market conditions and their impacts on scheduling, trading and settlements. The contractor will provide training on software changes and modifications required to comply with scheduling best practices and industry standards. The contractor will provide approximately 200 hours over a twelve (12) month period on the initial training. The contractor will provide on-going support throughout the term of the agreement.

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 03/02/2022, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49372 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfgwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [Laxamana, Junko \(BOS\)](mailto:Laxamana,Junko(BOS)); WendyWong26@yahoo.com; wendywong26@yahoo.com;
tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org;
L21PSCReview@ifpte21.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhr-psccordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 49372 - 21/22
Date: Wednesday, March 2, 2022 2:59:49 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 49372 - 21/22 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 49372 - 21/22 for \$136,500,000 for Initial Request services for the period 04/08/2022 – 04/07/2027. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/18061> 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

Published on *Personal Services Request Database* (<https://apps.sfgov.org/dh Drupal>)

Home > Union Receipt: 49372 - 21/22

Union Receipt: 49372 - 21/22

Posted March 9, 2022 - 10:03 by tmathews21

30 Day waiver - PLEASE CHECK the box if you agree to waive your 30 day right: Yes, I waive my rights to the 30 day period

Union Contact (verify correct user name): tmathews21

Modified PSC Record:

Initial PSC Record: 49372 - 21/22

Date Accessed: March 9, 2022

Additional Attachment(s)

Request for Proposals:

Power Scheduling Coordination and Related Support Services

Agreement No. PUC.PRO.0152

7/16/2021



San Francisco
Water Power Sewer
Services of the San Francisco Public Utilities Commission

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1 RFP Summary

1.1 Introduction

The San Francisco Public Utilities Commission (SFPUC, or “Department”), a department of the City and County of San Francisco (“City”), seeks to retain the services of a qualified Proposer, a CAISO certified Scheduling Coordinator,¹ to assist the SFPUC with power scheduling coordination services for the SFPUC’s participation in the markets of the California Independent System Operator (CAISO). The term Proposer or Proposers shall refer to any legal entity(ies) submitting a proposal in response to this Request for Proposals (RFP).

Proposers responding to this RFP must have proven expertise and extensive experience to perform as a Scheduling Coordinator Services (SC) Provider including any applicable certifications or licenses associated with SC Services or required by the CAISO, NERC or WECC. The SC Provider is responsible for emergency operational actions as may be needed. Proposers should be well versed in the CAISO’s market initiatives and operation procedures, including but not limited to (energy and resource adequacy bidding, e-tagging, master file maintenance, use-limited resource registration, resource adequacy enhancements, as well as power scheduling, trading, portfolio management, agency communications, and other power scheduling-related tasks.

The SFPUC reserves the right to commence, close, reduce or extend Consultant services at any time in response to changing needs. In addition, SFPUC reserves the right to enter no agreement, enter multiple agreements, amend and reissue the RFP. Please take notice: By participating in this competitive process, Proposer agrees that any agreement resulting from this process may be utilized by other public entities to procure the commodities and/or services on the same terms. It should also be noted that the Task Descriptions (see Section 5.2.5) provided by Proposer as part of its proposal may be incorporated into the scope of services section of the Agreement (see Appendix A. The Overhead and Profit Schedule’s billing rates (see Section 5.2.7) to be provided by the Proposer as part of its proposal will be directly incorporated into the Agreement (see Appendix A as the applicable billing rates. The material terms and conditions of the Agreement, including but not limited to the overhead and profit rate and billing rates listed in the submitted OPS, will not be negotiable.

Additional information relating to the RFP may be posted on the SFPUC Contract Administration Bureau webpage (<http://sfbid.sfwater.org>) as needed after issuance of the RFP. Proposers

¹ “Proposer” refers to any entity responding to this Request for Proposals (RFP).

should therefore consult the SFBid website regularly for these updates. The anticipated total amount and duration of the Professional Services Agreement (“Agreement”) are as follows:

Agreement Amount: \$6,000,000.00

Agreement Duration: 5 Years

The Agreement amount is inclusive of all reimbursable costs and all optional tasks. In addition to the agreement amount received by the Consultant, one of the services the Consultant will perform is remitting on behalf of SFPUC passthrough charges to the CAISO. Funds passed-through will not exceed \$130,500,000. We make note of this for accounting purposes, and to distinguish from actual compensation rendered for services. The SFPUC reserves the right to commence, close, reduce, or extend Proposer services at any time in response to changing needs. The SFPUC shall have the sole discretion to increase the Agreement amount up to \$9,000,000 and extend the Agreement term for up to a total of eight (8) years (or 96 months) consistent with City requirements.

The SFPUC may incorporate the Task Descriptions set forth herein into the Agreement as the applicable scope of services. The SFPUC will incorporate the Overhead and Profit Schedule’s (OPS) billing rates provided by the selected Proposer (“Consultant”) as part of its proposal into the Agreement. The terms of the Agreement, including the overhead and profit rate and billing rates listed in the submitted OPS, will be non-negotiable.

The SFPUC may post additional information relating to the RFP on the SFBid website after issuance of the RFP. Proposers are responsible for consulting the [SFBid website](#) regularly for these updates.

1.2 Tentative RFP Schedule

The following dates for issuance of the RFP, receipt and evaluation of proposals, as well as award of an Agreement, are tentative, non-binding, and subject to change without prior notice:

Advertisement of RFP	7/16/2021
Pre-Submittal Conference.....	7/29/2021
Deadline for Proposers to Submit Questions	8/6/2021
Deadline for Proposers to Submit Proposals.....	8/19/2021
Posting of Proposer Ranking.....	9/22/2021
Public Utilities Commission Authorization to Execute Agreement	10/26/2021
Board of Supervisor's Approval	12/23/2021
Deadline for Proposer to Achieve Vendor Compliance and Execute Agreement	1/3/2022
Notice of Award of Agreement.....	1/20/2022

1.3 Pre-Submittal Conference

Pre-submittal conference information:

Time: 2:00 PM

Date: 7/29/2021

Location: <https://bluejeans.com/940223718>

The SFPUC encourages attendance at the pre-submittal conference. The SFPUC will address questions regarding the RFP at this conference and provide any new information at that time. While City staff may provide oral clarifications, explanations, or responses to any inquiries, the City will not be bound by any oral representation. If the City provides any new and/or substantive information in response to questions raised at the pre-submittal conference, the SFPUC will memorialize the information in a written addendum to this RFP.

1.4 Requests for Information and Addenda/Change Notices

All requests for information concerning the RFP, whether submitted before or after the pre-submittal conference, must be in writing and submitted via the [SFBid website](#).

The SFPUC will provide any interpretation of, or make any change in, the RFP by addendum, which will become a part of the RFP and of any Agreement that the SFPUC awards. The SFPUC will make reasonable efforts to post any modifications to the RFP in a timely manner on the [SFBid website](#).

Please refer to Sections 8.2 and 8.3 for more information regarding RFP inquiries and addenda/change notices.

1.5 Diversity in Contracting

This contracting opportunity is subject to compliance with the City's Administrative Code Chapter 14B Local Business Enterprise (LBE) subcontracting requirements. In addition, the SFPUC seeks to promote diversity within its contracting opportunities. Thus, the agency strongly encourages proposals from Proposers that optimize the use of LBE, Micro-LBE, Small-LBE, and SF Small Business Administration (SBA)-certified firms. The SFPUC also seeks to further optimize the use of consultant teams that reflect the diversity of the City and County of San Francisco. As such, is the SFPUC recommends that Proposers consider the composition of their teams in terms of gender, age, ethnicity, and race, and utilize teams that include a diverse mix of staff at all organizational levels.

Note that the SFPUC's encouragement of diversity will not affect the evaluation of proposals for this RFP. Criteria for evaluation is limited to the factors described in the Evaluation and Selection Criteria section of this RFP (Section 6).

1.6 Limitations on Communications

From the earlier of either 1) the publication of this RFP on the SFPUC's Contract Advertisement Report, or 2) the date this RFP is issued, until completion of the competitive process of this RFP, either by cancelation or by final action of the San Francisco Public Utilities Commission, Proposers, subconsultants, vendors and/or their representatives or other interested parties, may communicate with the SFPUC only as instructed in this RFP.

The SFPUC strictly prohibits any attempt to communicate with or solicit any City official, representative or employee, except as instructed in this RFP. Failure to comply with this communications protocol may, at the sole discretion of the SFPUC, 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 RFP.

1.7 Conflicts of Interest

The City will require the Consultant to agree to comply fully with and be bound by all applicable provisions of state and local law related to conflicts of interest. The SFPUC advises Proposers to review [Section 12](#) of this RFP carefully before submitting a proposal.

2 Background

2.1 San Francisco Public Utilities Commission

The SFPUC is the City department that provides retail drinking water and wastewater services to San Francisco, wholesale water to three (3) Bay Area counties, and green hydroelectric and solar power to San Francisco's municipal operations.

The mission of the SFPUC is to:

- Serve San Francisco and its Bay Area customers with reliable, high quality, and affordable water, while maximizing benefits from power operations and responsibly managing the resources entrusted to its care;
- Protect public health, public safety, and the environment by providing reliable and efficient collection, treatment, and disposal of San Francisco's wastewater;
- Conduct its business affairs in a manner that promotes efficiency, minimizes waste, and ensures rate payer confidence; and
- Promote diversity and the health, safety, and professional development of its employees.

The SFPUC is comprised of three (3) separate enterprises: Water, Wastewater, and Power. The Water Enterprise is responsible for managing the transmission, treatment, storage, and distribution of potable water to San Francisco's wholesale and retail customers. The Wastewater Enterprise is responsible for managing the collection, treatment, and disposal of San Francisco's wastewater. The Power Enterprise is responsible for managing retail power sales, transmission and power scheduling, energy efficiency programs, street lighting services, utilities planning for redevelopment projects, energy resource planning efforts, and various other energy services.

With regard to the SFPUC Divisions, External Affairs provides Communications and Outreach services, Business Services oversees all financial and accounting matters for the entire SFPUC, and Infrastructure delivers capital improvement programs.

2.2 Reserved (SFPUC Policies)

2.3 SFPUC Power Enterprise

The SFPUC Power Enterprise (AA-/AA long-term bond ratings from Fitch/Standard and Poor's) is a municipal electrical utility servicing approximately 3,500 customer accounts with an annual load of approximately 1,000 gigawatt-hours (GWh). The SFPUC owns and manages the Hetch Hetchy Water and Power (HHP) resource located in the Sierra Nevada mountain range. HHP generation is delivered over HHP transmission facilities to SFPUC wholesale and retail customers.

Most SFPUC loads are in the Greater Bay Area and are served using Pacific Gas & Electric (PG&E) transmission and distribution facilities.

2.4 SFPUC Power Projects

The Hetch Hetchy hydro project has a 406 MW nameplate rating. Typically, it generates up to 360 MW in the spring during peak hours, and in other months, the SFPUC uses it to follow the City's municipal load and Airport Tenant load (~150 MW peak). The SFPUC also has a contract with a 4.5 MW solar project located within San Francisco. The SFPUC buys and sells with third parties to balance its short/long positions and ensure compliance with regulatory requirements.

The SFPUC also manages and administers CleanPowerSF, San Francisco's Community Choice Aggregation program, and its energy portfolio. CleanPowerSF is a partnership between the City and County of San Francisco and PG&E to supply San Francisco electricity customers with affordable and cleaner energy. The City launched CleanPowerSF in May 2016 with the following goals: to provide (1) affordable and reliable electricity services to San Francisco residents and businesses, (2) cleaner energy alternatives advancing the City's Greenhouse Gas reduction goals; (3) investment in local renewable energy projects and jobs; and (4) long-term rate and financial stability. As a program of the Power Enterprise, CleanPowerSF is under the direct administrative oversight of its Assistant General Manager for Power, who in turn reports to the SFPUC General Manager. The program is funded solely by CleanPowerSF ratepayers and does not rely on funding from the Power Enterprise, SFPUC, or the City.

CleanPowerSF serves approximately 380,000 retail customer accounts with an annual energy requirement of approximately 3,000 GWh and peak demand of approximately 500 MW. The program has maintained a participation rate of more than 96% and has attracted more than 7,000 upgrades to its 100% Renewable Portfolio Standards (RPS)-eligible renewable SuperGreen product. CleanPowerSF's supply portfolio is comprised of numerous third-party energy contracts of varying tenor: long-term Power Purchase Agreements (PPAs), mid-term, and short-term transactions. These contracts include Inter-SC Trades (IST) within the CAISO, as-available and dispatchable renewable and energy storage contracts with projects located in the CAISO, and renewable energy carbon-free energy purchases from in-state and out-of-state resources indexed to a CAISO hub.

Although the SFPUC manages and administers both the HHP and CleanPowerSF energy portfolios, the programs service separate retail load and operate as two lines of businesses, maintaining separate financial and accounting records. HHP and CleanPowerSF are separate component units on the Hetch Hetchy Water and Power financial statement.

The SFPUC currently conducts its power operations and services in accordance with multiple agreements and Tariffs, including a CAISO Operating Agreement, the Wholesale Distribution Tariff, and a Scheduling Coordination Agreement with APX Power Markets, Inc. (APX). The APX agreement expires in June 2022 and the SFPUC is currently engaged in a comprehensive strategic

initiative to determine and secure the resources and services required to ensure its economical and uninterrupted operations.

3 Scope of Services

3.1 Description of Services

The primary role of the selected Proposer(s) will be to perform the following tasks:

1. Submitting Day Ahead and Real Time Interchange Schedules and Bids to CAISO
2. Managing Communications Between CAISO and SFPUC Schedulers and Operators including 7x24 dispatch of the plants
3. Managing CAISO Settlements and Payments
4. Managing CAISO and CPUC Resource Adequacy Requirements
5. Manage Access to CAISO Systems for Meter, Outage, Settlement, Scheduling, and Bid/Award data
6. Submit Settlement Quality Meter Data (SQMD) to CAISO on behalf of SFPUC
7. Optional Services

The Consultant will work under the direction of the SFPUC Power Enterprise, Energy Scheduling and Settlements group.

3.2 Contract Term and Schedule

The Agreement will have a duration of 5 Years.

The SFPUC reserves the right to commence, close, reduce or extend Consultant's services at any time in response to changing needs. In addition, the SFPUC shall have the sole discretion to increase the Agreement amount up to \$9,000,000 and to extend the Agreement term for up to a total of eight (8) years (or 96 months) consistent with City requirements.

3.3 Detailed Description of Tasks

The following is a detailed description of the tasks required to complete the assignment.

TASK 1 SUBMITTING DAY AHEAD AND REAL TIME INTERCHANGE, GENERATION AND LOAD SCHEDULES, RESOURCE ADEQUACY AND ANCILLIARY SERVICE BIDS TO THE CAISO FOR THE HHP AND CLEANPOWERSF PORTFOLIOS

The SC shall submit schedules to the CAISO in the forward and the real-time markets pursuant to CAISO tariff and protocols.

Task 1 – Deliverables may include but are not limited to:

- The primary role of the selected SC will be to submit interchange, generation and load schedules into the CAISO scheduling system on behalf of the SFPUC within CAISO timelines as well as submitting corresponding meter data. The selected SC will work with and under the direction of the Scheduling and Settlements group in the SFPUC

Power Enterprise as well as operations staff at the Hetch Hetchy project located in Moccasin, California.

- The SC shall work with SFPUC to develop a detailed procedure once a contract is finalized.
- All transactions should be done using a unique HHP SC Identifier (“SCID”) and a unique CleanPowerSF SCID to facilitate settlements tracking and verification.
- SC services should include the following:
 - 7 days per week, day-ahead pre-scheduling
 - 7 days per week, 24-hour real-time services
 - Credit services/collateral with the CAISO
- The SC will commence scheduling on behalf of the SFPUC by the opening of the day-ahead market for the trade date of April 1, 2022. The selected SC must be able to provide the scope of services for a period of not less than five (5) years.
- The SC will proactively identify strategic bidding methodologies, Ancillary Services, and Resource Adequacy where possible to maximize CAISO revenue, minimize exposure and more efficiently perform related tasks.
- Maximize co-optimization of Ancillary Services (AS) and energy in the DAM that allows for full flexibility in terms of the combination of energy and AS capacity that can be offered.
- The SC shall submit and validate inter-SC trades on behalf of the SFPUC as required.
- The SC shall provide acknowledgement of successful submission of all schedules and notification of CAISO submission errors.
- The SC shall provide a tool and/or direct access to the SIBR, CMRI, MRI-S, ADS, CIRA, and other CAISO scheduling related portals as needed. The SFPUC should, in coordination with the SC, have the ability to modify the schedule submission for resubmittal to CAISO.
- The SC shall facilitate the submission and receipt of CAISO DA/RT forecasts for Sunset Reservoir photovoltaic and other renewable generation from CAISO if needed.
- The SC shall coordinate e-tagging for power schedules.
- SFPUC contracts through Power Purchase Agreements (PPAs) for the output from variable energy resources (VER), storage resources, and hybrid or co-located solar + storage resources, requiring SFPUC and the SC to be the authorized and designated SC for the Facility and perform the SC responsibilities accordingly.
 - The SC shall submit day ahead and real-time bids for VER, energy storage and hybrid resources, including setting up mechanisms to receive real-time information from third parties, if needed.
 - The SC shall coordinate with supplying generator owners and submit supply schedules to the Day-Ahead and Real-Time Markets, if needed.

- Operational scheduling processes and procedures will be negotiated as necessary for the SFPUC/SC to maximize benefits and minimize burdens as they exist.
- The SC shall monitor resource performance and provide recommendations for resource scheduling and dispatch to support portfolio optimization strategies.
- The SC shall provide all necessary CAISO settlement data and generate CAISO Charges Invoices to share with PPA Counterparties.

TASK 2 MANAGING COMMUNICATIONS BETWEEN CAISO, SFPUC SCHEDULERS / OPERATORS, AND OTHER AGENCIES

The SC shall manage communications between CAISO and the SFPUC forward schedulers, real-time operators, and generator owners.

Task 2 - Deliverables may include but are not limited to:

- The SC shall perform 7X24 dispatch of the plants.
- Install, maintain, and monitor the CAISO's Automatic Dispatch System (ADS) for the SFPUC's real-time dispatches.
- Notify the SFPUC Hetch Hetchy operators of CAISO dispatches and relay specific operating instructions.
- Reporting planned and unplanned generation resource outages on behalf of the SFPUC using the CAISO's Outage Management System (OMS).
- Document all communications with CAISO and Hetch Hetchy operators, including but not limited to information requests, outage notification
- Support and Coordinate with the SFPUC for contracted energy resources as needed, including for participation in CAISO's New Resource Implementation process and for dispatch management.
- For PPA related agreements, the SC will provide dispatch management and act as the interface and SC between renewable resource operator and the CAISO; meeting all DOT, outage, and curtailment notices. Manage, record, and coordinate planned and unplanned outages effectively in the Outage Management System (OMS) in accordance with the CAISO Tariff.

TASK 3 MANAGING CAISO AND CPUC RESOURCE ADEQUACY REQUIREMENTS

The SC should work with the SFPUC to manage the Resource Adequacy portfolios, Supply Plans and Resource Adequacy Plans including submissions to the CAISO and the CPUC. The SC should inform the SFPUC of new initiatives, evolving regulations and obligations, and other updates on how such changes may impact operations.

Task 3 – Deliverables:

- Grant access to SFPUC employees to submit annual and monthly RA and Supply plans to CAISO through CIRA for HHP and CleanPowerSF.
- Support the submission of annual and monthly CleanPowerSF RA plans to the CPUC through tracking and providing reports with the necessary resource information for the program’s RA portfolio.
- Monitor, notify, and submit additional regulatory compliance reports related to RA to the CAISO and CPUC such as the Flex Capacity Needs Assessment, Import Allocation Process, Path 26 Process, and others as needed.
- Monitor and report on post cross-validation errors and POSO (Planned Outage Substitution Obligations).
- Monitor and report on CAISO NQC’s list for resources in the HHP and CleanPowerSF portfolios. Complete and submit necessary requests to CAISO for inclusion in NQC lists.

TASK 4 MANAGING CAISO SETTLEMENTS AND PAYMENTS

The SC should manage all CAISO Settlement activities to the CAISO. SC shall be well versed in CAISO dispute procedures and shall be expected to maintain timely challenges to disputed CAISO charges and costs as well as provide regular reporting on disputes and good-faith negotiations to the SFPUC.

Task 4 – Deliverables may include but are not limited to:

- Retrieve CAISO Settlement Statements and Determinant files from CAISO.
- Retrieve CAISO Invoices.
- Open timely ISO Disputes where necessary and sees the dispute process through to resolve settlement errors.
- Provide Settlement validation summary report to SFPUC. Validation deltas, outlier charge amounts requiring attention, charge summary, etc.

The SFPUC is unable to process weekly invoice payments/collections; and/or respond to immediate collateral calls. Therefore, the SFPUC seeks a monthly payment cycle with the SC, where the SC manages the daily/weekly cash flows and cash calls

- Perform weekly cash clearing associated with CAISO invoices.
- Provide weekly/monthly invoice to SFPUC for CAISO payment
- Monitor and respond to any credit or collateral calls from the CAISO. Provide credit/collateral call information to SFPUC at time of event.
- Submit payment to the CAISO on behalf of SFPUC in accordance to the CAISO Payments Calendar.
- In accordance with NERC, WECC and CAISO requirements, provide all e-tagging and checkout of schedules with applicable timelines.

TASK 5 PROVIDE ACCESS TO CAISO SYSTEMS FOR METER, OUTAGE, SETTLEMENT, SCHEDULING, AND BID/AWARD DATA

The SC shall provide access to all relevant CAISO data, on SC's software systems and/or via direct access for SFPUC to CAISO systems. The SC shall demonstrate experience in the use of SIBR, ADS, CMRI, CIRA, Master File User Interface, OMS and other applicable CAISO applications.

Task 5 – Deliverables may include but are not limited to:

- The SFPUC uses PowerSettlements SettleCore system, and expects that system to be able to retrieve data from the CAISO systems via a digital certificate
- The SC shall provide digital certificate authorization for SFPUC to download these files. Data and file types should include, but not limited to, the following:
 - Expected energy
 - Market awards
 - Market prices
 - SFPUC and CAISO (public) bill determinants for all settlement statement versions
 - SFPUC settlement statements and invoices for all settlement statement versions
 - Submitted meter data
- The SC shall allow specified SFPUC staff access to relevant CAISO Market Participant Portal tools including CMRI, SIBR, MRI-S, ADS, CIRA, MasterFile and OMS by submitting applications to CAISO and facilitating keeping security certificates up to date

TASK 6 SUBMIT SETTLEMENT QUALITY METER DATA (SQMD) TO CAISO ON BEHALF OF HHP AND CLEANPOWERSF

Task 6 – Deliverables may include but are not limited to:

- The SC shall be required to provide automated receipt of load and generation meter data in CAISO MRI-S format, or other agreed-upon format, from SFPUC for each meter data submission period via vendor API, FTP, or web services, for delivery to CAISO.
- SC will ensure ALL meter data is submitted on time (to the CAISO Tariff timeline for meter data), accurately, and completely. SC will notify SFPUC when submission errors or tardiness occur.
- The SC shall provide acknowledgement of successful submission of all meter data and notification of CAISO submission errors.
- The SC shall coordinate with the SFPUC the biennial SC Self Audit. The SC shall submit a SQMD Plan Affirmation and SC Self Audit Attestation as required by CAISO. The SC shall contract with an agreed-upon auditor, if necessary, to audit SFPUC's SQMD collection, validation, and data. Charges for the third-party auditor shall be passed through the SC invoice process and paid by SFPUC.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Power Scheduling Coordination and Related Support Services (PRO.0152)

Funding Source: Energy Services/Wheeling Charges

PSC Duration: 5 years

PSC Amount: \$136,500,000

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) requires Scheduling Coordinator (SC) Services provided to the Hetch Hetchy (HHP) and CleanPowerSF energy portfolios for participation in the California Independent System Operator (CAISO) energy markets. The SC will assist the SFPUC and both energy portfolios in optimizing its short-term resource utilization and service to its loads, including but not limited to submittal of Day Ahead and Real Time generation, load, and interchange schedules, submitting bids, submitting energy trades, managing communications between CAISO, SFPUC schedulers, and Power House Operators, handling settlements, and other related services. The CAISO high and low voltage wheeling charges are required to be paid through SFPUC's contracted Scheduling Coordinator (SC) such that these charges can be paid to support our energy transmission from Hetch Hetchy system to San Francisco customers. CAISO's tariffs define these charges as a type of "pass-through charge" that SC will pay the charge to CAISO on the behalf of the SC client (e.g. SFPUC) without any additional fee for the pass-through charge. The CAISO settlement charges are paid on behalf of SFPUC and in accordance to the CAISO Payments Calendar. The breakdown of charges are as follows: \$6,000,000 for the contract costs and \$130,500,000 for the CAISO pass-through charges.

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

In order for the SFPUC to provide service to its electric customers, it must wheel electric power over the transmission system that is controlled by the CAISO, pursuant to a state law enacted in 1996. The CAISO tariff requires that only entities that have been certified as Scheduling Coordinators may interact with the CAISO to schedule all power that is transported or wheeled over the transmission system. The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

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

Yes, this service is currently being provided via PSC No. 45401-13/14 (CS-344). The department determined that a new Request for Proposal (RFP) will be issued for scheduling coordinator services. The PSC No. 46657-19/20 (PRO.0152) was approved by the Civil Service Commission (CSC) on 1/6/2020. The issuance of the RFP was delayed due to complexity of the RFP, the COVID-19 pandemic and the resulting Shelter-in-Place order, requiring the department to seek CSC approval again, as the contract was not executed within a year of CSC approval.

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):

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.

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

B. Explain the qualifying circumstances:

The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Detailed knowledge of CAISO scheduling and settlements, markets, and CAISO charge codes; substantial experience providing scheduling coordination services; knowledge of municipal utilities and hydroelectric operations and maintenance practices.

B. Which, if any, civil service class(es) normally perform(s) this work? 5602, Utility Specialist;

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

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

None because SFPUC is not a certified Scheduling Coordinator.

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

A. Explain why civil service classes are not applicable.

The 5602 (Utility Specialists) class provides energy trading, energy scheduling, and complex procurement planning analysis. However, this class does not currently have the specialized expertise to meet new requirements for advanced power scheduling, trading and related support services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Civil service class 5602 already exists.

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. The contractor will provide SFPUC staff (including management, utility specialists and utility analysts) with training to provide continuity of business services, enhanced trading and scheduling capabilities, and market value assessment. The contractor will provide on-going support and training to SFPUC staff in the Power Purchasing & Scheduling, Settlements, and Strategic Planning groups of changing electricity market conditions and their impacts on scheduling, trading and settlements. The contractor will provide training on software changes and modifications required to comply with scheduling best practices and industry standards. The contractor will provide approximately 200 hours over a twelve (12) month period on the initial training. The contractor will provide on-going support throughout the term of the agreement.

- 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 12/21/2020, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47781 - 20/21

DHR Analysis/Recommendation:

action date: 03/01/2021

Commission Approval Required

Approved by Civil Service Commission

03/01/2021 DHR Approved for 03/01/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 45401 - 13/14)

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

Type of Service: Power Scheduling Coordination and Related Support Services (CS-344)

Funding Source: Energy Services/Wheeling Changes

PSC Original Approved Amount: \$5,000,000

PSC Original Approved Duration: 03/03/14 - 02/01/19 (4 years 48 weeks)

PSC Mod#1 Amount: \$100,000,000

PSC Mod#1 Duration: 02/02/19-06/16/20 (1 year 19 weeks)

PSC Mod#2 Amount: \$42,000,000

PSC Mod#2 Duration: 06/17/20-06/16/22 (2 years)

PSC Mod#3 Amount: \$2,900,000

PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$149,900,000

PSC Cumulative Duration Proposed: 8 years 15 weeks

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) requires schedule coordination through the California Independent System Operator (CAISO), for power trading services to optimize the SFPUC's short-term resource utilization and service to its loads, including but not limited to submittal of Day Ahead and Real Time interchange schedules, submitting bids, submitting energy trades, managing communications between CAISO and SFPUC schedulers and operators, handling settlements, and other related services. The CAISO high and low voltage wheeling charges are required to be paid through SFPUC's contracted Scheduling Coordinator (SC) such that these charges can be paid to support our energy transmission from Hetch Hetchy system to San Francisco customers. CAISO's tariffs define these charges as a type of "pass-through charge" that SC will pay the charge to CAISO on the behalf of the SC client (e.g. SFPUC) without any additional fee for the pass-through charge.

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

In order for the SFPUC to provide service to its electric customers, it must wheel electric power over the transmission system that is controlled by the CAISO, pursuant to a state law enacted in 1996. The CAISO tariff requires that only entities that have been certified as Scheduling Coordinators may interact with the CAISO to schedule all power that is transported or wheeled over the transmission system. The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

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

Services have been provided in the past through earlier PSC request. See 45401 - 13/14

D. Will the contract(s) be renewed?

No.

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

The SFPUC is requesting Personal Service Contract authority in order to continue assisting the SFPUC with power trading services to optimize the SFPUC's short-term resource utilization and service to its loads. In addition, the SFPUC is obligated to follow the CAISO's tariff for 24x7 operations for on-going longer term support regulated by State, resulting in a multiple-year agreement.

2. Reason(s) for the Request

A. Display all that apply

Other (be specific and attach any relevant supporting documents):

REASON FOR CHECKING OTHER:

The SFPUC is not a certified Scheduling Coordinator. Without contracting with a certified Scheduling Coordinator, the SFPUC will not be able to transport power to its electric customers.

Explain the qualifying circumstances:

no response from department

B. Reason for the request for modification:

The SFPUC requires a third-party to act as scheduling coordinator on behalf of the SFPUC and assist with power scheduling coordination services for the SFPUC's participation in the markets of the California Independent System

Operator (CAISO). Mod. No. 3 to PSC 45401-13/14 is required to ensure continuity (so there is no gap in services) while a new Request for Proposal (RFP) solicitation is being conducted. Mod. No. 3 to PSC 45401-13/14 increases the PSC Amount to equal the Contract Amount.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Detailed knowledge of CAISO scheduling and settlements, markets, and CAISO charge codes; substantial experience providing scheduling coordination services; knowledge of municipal utilities and hydroelectric operations and maintenance practices.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5602, Utility Specialist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

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 5602 (Utility Specialists) class provides energy trading, energy scheduling, and complex procurement planning analysis. However, this class does not currently have the specialized expertise to meet new requirements for advanced power scheduling, trading and related support services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Civil service class 5602 already exists.

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.
See supplemental attachment A.
- 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.
APX, Inc.

7. Union Notification: On 04/07/20, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

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

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45401 - 13/14
DHR Analysis/Recommendation:
Commission Approval Not Required
Approved by DHR on 04/27/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

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

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

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

Funding Source: Office of Community Infras and Investment

PSC Amount: \$3,000,000

PSC Est. Start Date: 04/04/2022

PSC Est. End Date 04/03/2028

1. Description of Work

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

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

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

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

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

This service was previously approved through PSC 4120 - 05/06, PSC 4113 - 04/05, and PSC 44043-20/21 (please see attachment uploaded in the "Prior or Similar Approved PSC" section). Post approval of the PSC 44043-20/21, the Agency modified its approach and wished to create a pool of qualified Consultancy firms that could support the various development project across the City. Ultimately, a Request For Qualifications (RFQ) was issued in the Fall 2021. On June 20, 2005 for similar services for the Hunters Point Shipyard Phase One Improvement - Community Facility District (CFD) # 7.

D. Will the contract(s) be renewed?

No

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

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

Short-term or capital projects requiring diverse skills, expertise and/or knowledge: The specialty requires a combination of knowledge, experience and comprehensive understanding in development engineering, financial and audit analysis, and legal analysis and interpretation. Services required on an as-needed, intermittent, or periodic basis: Projects requiring these specialized skills occur only periodically. Developments requiring financial services for acquisition of facilities are unusual and intermittent. Also, the work load is periodic and erratic due to the developer's construction schedule in response to changing economic conditions and due to the inconsistent availability of special tax levys known as Community Fund District (CFD) funds. Cases where future funding is so uncertain that the

establishment of new civil service positions, classes or programs is not feasible: The availability of Development CFD Bond funds depends on the property tax assessment and is unpredictable on a long term basis and inconsistent due to changing economic conditions.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Experience in establishing, reviewing and interpreting public finance district and acquisition agreements, Experience and availability of cost estimators and personnel to review construction design and related costs, and reimbursement applications. Key personnel should have a minimum of five years of experience.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

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

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

- A. Explain why civil service classes are not applicable.
Civil Service classifications are applicable but City personnel do not have the required expertise or experience.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Civil Service classification already exists. It would not be practical to adopt new civil service classes, as the request for this type of service is only periodic. On-going capital development projects requiring financial services for acquisition of facilities are unusual and intermittent. The amount of work requested by the developer is usually erratic and unpredictable.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training is anticipated. Zero hours. Since these services are only going to be utilized on an as-needed, intermittent, or periodic basis.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 02/02/2022, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21

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

COMPLETE AND ACCURATE:

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44155 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

Sy, Don (DPW)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
Sent: Wednesday, February 2, 2022 10:25 AM
To: Burns, Alexander (DPW); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Sy, Don (DPW); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44155 - 21/22

RECEIPT for Union Notification for PSC 44155 - 21/22 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 44155 - 21/22 for \$3,000,000 for Initial Request services for the period 04/04/2022 – 04/03/2028. 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/17903> 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)

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

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

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

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

Funding Source: Office of Community Infrasy and Investment

PSC Amount: \$3,000,000

PSC Est. Start Date: 01/31/2021

PSC Est. End Date 12/31/2026

1. Description of Work

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

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

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

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

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

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

D. Will the contract(s) be renewed?

No

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

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

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

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Experience in establishing, reviewing and interpreting public finance district and acquisition agreements, experience and availability of cost estimators and personnel to review construction design and related costs, and reimbursement applications. Key personnel should have a minimum of five years of experience.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

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

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

- A. Explain why civil service classes are not applicable.
Civil Service classifications are applicable but City personnel do not have the required expertise or experience.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Civil Service classification already exists. It would not be practical to adopt new civil service classes, as the request for this type of service is only periodic. On-going capital development projects requiring financial services for acquisition of facilities are unusual and intermittent. The amount of work requested by the developer is usually erratic and unpredictable.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training is anticipated. Zero hours. Since these services are only going to be utilized on an as-needed, intermittent, or periodic basis.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.

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

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

7. Union Notification: On 11/18/2020, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44043 - 20/21

DHR Analysis/Recommendation:

action date: 02/01/2021

Commission Approval Required

Approved by Civil Service Commission

02/01/2021 DHR Approved for 02/01/2021



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR

May 17, 2006

NOTICE OF CIVIL SERVICE COMMISSION ACTION

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

LINDA RICHARDSON
PRESIDENT

THOMAS T. NG
VICE PRESIDENT

ALICIA D. BECERRIL
COMMISSIONER

DONALD A. CASPER
COMMISSIONER

MORGAN R. GORRONO
COMMISSIONER

KATE FAVETTI
EXECUTIVE OFFICER

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

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

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

CIVIL SERVICE COMMISSION

KATE FAVETTI
Executive Officer

Attachment

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

RECEIVED
06 MAY 22 AM 11:05
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CONTRACT ADMINISTRATIONS

**POSTING FOR
May 15, 2006**

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

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



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

June 22, 2005

GAVIN NEWSOM
MAYOR

NOTICE OF CIVIL SERVICE COMMISSION ACTION ACTION

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

LINDA RICHARDSON
PRESIDENT

THOMAS T. NG
VICE PRESIDENT

ALICIA D. BECERRIL
COMMISSIONER

DONALD A. CASPER
COMMISSIONER

MORGAN R. GORRONO
COMMISSIONER

KATE FAVETTI
EXECUTIVE OFFICER

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

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

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

CIVIL SERVICE COMMISSION

KATE FAVETTI
Executive Officer

Attachment

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

RECEIVED
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DPW
CONTRACT ADMINISTRATIONS

POSTING FOR

June 3, 2005

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: TTX-Armored Car Services

Funding Source: General Funds

PSC Duration: 10 years 2 days

PSC Amount: \$3,000,000

1. Description of Work

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

The Office of the Treasurer and Tax Collector is seeking to procure licensed armored car and secure safe

services to serve all departments citywide. Suppliers must have experience offering high-security, high-volume armored transport, currency processing, smart vault and change order services. These services

will be used to assist City departments with the movement of currency, coins and checks to designated

vaults and cash processing centers. These services include:

1) secure and efficient transportation of Citywide cash and check collections and deposits to bank.

2) deposit pickup from various citywide cash collection points, change order service and delivery, and emergency cash services.

3) providing secured vaults or safes in various department locations which departments can use to deposit their collections and when it is most advantageous.

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

The City does not own armored cars and does not have armed personnel to specifically deal with picking up cash and check collections for deposit to the banks. Without this service, city personnel will be exposed to safety and security risk when transportation their deposits to the banks. The City does not also have the financial ability to purchase and maintain various safes and vaults to deploy to citywide cash collection points. The secure safe service replaces armored carrier pick up where feasible.

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 provided in the past under PSC 48592-13/14

D. Will the contract(s) be renewed?

If necessary.

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 Office of the Treasurer & Tax Collector (TTX) is requesting approval of PSC# 42046-21/22 for Armored Car services. TTX requires long term use of Armored Car Services (over 5 years) to be used to support a variety of City departments with their cash pick up and vault service needs. The City does not have the personnel nor financial resources to provide these services without an outside contractor. Additionally, the armored car industry is highly centralized with only four major players nationwide. In order to provide required cash pick up services City wide without disruption to services, TTX requires long term support (over 5 years) of Armored Car services.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The supplier will provide specially equipped armored transport and secure safes that will be placed at various City locations. The city does not have the resources to provide armored car and vault services.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Armored car service provider must demonstrate successful experience providing armored car services and must have experience offering high-security, high-volume armored transport, currency processing, smart vault and change order services. Armored car service provider must possess a valid license with the Bureau of Security and Investigative Services(BSIS), adequate training and experience in armored car services as well as possess a specially equipped armored car transport and secure safe equipment.

B. Which, if any, civil service class(es) normally perform(s) this work? 8306, Senior Deputy Sheriff; 8308, Sheriff's Sergeant; 8504, Deputy Sheriff (SFERS); 8506, Senior Deputy Sheriff (SFERS);

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the supplier will provide specially equipped armored transport and secure safes that will be placed at various City locations.

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

The city does not have the resources to provide armored car and vault services.

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

A. Explain why civil service classes are not applicable.

The City does not have a designated classification and equipment for armored car transportation services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the city does not have the equipment for armored car transportation.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. Contractor will train employees on safe cash deposit hand-off practices while working with the contractor to ensure secure transition of funds. Training/Orientation will be approximately 1 hour per location before the start of service.

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

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

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

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

7. **Union Notification:** On 02/07/2022, the Department notified the following employee organizations of this PSC/RFP request:
Deputy Sheriff's Association; SF Sheriff's Managers and Supv

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B Goodlett Place City Hall Room 140

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42046 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of amanda.wentworth@sfgov.org
To: [Wentworth, Amanda \(TTX\); sfmsa@gmail.com; kennethlomba@gmail.com; ecdemvoter@aol.com; Wentworth, Amanda \(TTX\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Wentworth.Amanda(TTX);sfmsa@gmail.com;kennethlomba@gmail.com;ecdemvoter@aol.com;Wentworth.Amanda(TTX);DHR-PSCCoordinator,DHR(HRD)@sf.gov)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42046 - 21/22
Date: Monday, February 7, 2022 5:07:53 PM

RECEIPT for Union Notification for PSC 42046 - 21/22 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 42046 - 21/22 for \$3,000,000 for Initial Request services for the period 03/01/2022 – 02/29/2032. 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/17929> 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: TREASURER/TAX COLLECTOR -- TTXDept. Code: TTXType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Armored Car & VaultFunding Source: General FundsPSC Duration: 9 years 51 weeksPSC Amount: \$5,000,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of the Treasurer and Tax Collector is seeking to procure licensed armored car and secure safe services to serve all departments citywide. Suppliers must have experience offering high-security, high-volume armored transport, currency processing, smart vault and change order services. These services will be used to assist City departments with the movement of currency, coins and checks to designated vaults and cash processing centers. These services include:

- 1) secure and efficient transportation of Citywide cash and check collections and deposits to bank.
- 2) deposit pickup from various citywide cash collection points, change order service and delivery, and emergency cash services.
- 3) providing secured vaults or safes in various department locations which departments can use to deposit their collections and when it is most advantageous.

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

The City does not own armored cars and does not have armed personnel to specifically deal with picking up cash and check collections for deposit to the banks. Without this service, city personnel will be exposed to safety and security risk when transporting their deposits to the banks. The City does not also have the financial ability to purchase and maintain various safes and vaults to deploy to citywide cash collection points. The secure safe service replaces armored carrier pick up where feasible.

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 provided in the past under PSC 48592-13/14

D. Will the contract(s) be renewed?

Potentially

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.

TTX requires long term support for Armored Car and Vault services.

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

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

B. Explain the qualifying circumstances:

Specialized armored car and vault equipment are required.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Armored car service provider must demonstrate successful experience providing armored car services and must have experience offering high-security, high-volume armored transport, currency processing, smart vault and change order services. Armored car service provider must possess a valid license with the Bureau of Security and Investigative Services (BSIS), adequate training and experience in armored car services as well as possess a specially equipped armored car transport and secure safe equipment.
- B. Which, if any, civil service class(es) normally perform(s) this work? 8306, Senior Deputy Sheriff; 8308, Sheriff's Sergeant; 8504, Deputy Sheriff (SFERS); 8506, Senior Deputy Sheriff (SFERS);
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the supplier will provide specially equipped armored transport and secure safes that will be placed at various City locations.

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

N/A the city does not have the resources to provide armored car and vault services.

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

- A. Explain why civil service classes are not applicable.
The City does not have a designated classification and equipment for armored car transportation services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, in addition to maintaining a valid license with BSIS and purchasing a fleet of armored car vehicles and secured safes, the City would not be able to stay up to date with the ever changing technology required or the need for maintaining and updating the equipment.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. N/A
- 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 02/21/2020, the Department notified the following employee organizations of this PSC/RFP request:
Deputy Sheriff's Association; SF Sheriff's Managers and Supv

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

Name: Kimmie Wu Phone: 415-554-4513 Email: Kimmie.wu@sfgov.org

Address: 1 Dr. Carlton B Goodlett Place, City Hall Room 140 San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48274 - 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: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Armored Car and Secured Vault

Funding Source: General Fund

PSC Amount: \$5,000,000

PSC Est. Start Date: 12/02/2013

PSC Est. End Date
06/30/2023

1. Description of Work

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

The Office of the Treasurer and Tax Collector is seeking to procure licensed armored car and secure safe services to serve all departments citywide. These services include:

- 1) secure and efficient transportation of Citywide cash and check collections and deposits to bank.
- 2) deposit pickup from various citywide cash collection points, change order service and delivery, and emergency cash services.
- 3) providing secured vaults or safes in various department locations which departments can use to deposit their collections and when it is most advantageous.

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

The City does not own armored cars and does not have armed personnel to specifically deal with picking up cash and check collections for deposit to the banks. Without this service, city personnel will be exposed to safety and security risk when transporting their deposits to the banks. The City does not also have the financial ability to purchase and maintain various safes and vaults to deploy to citywide cash collection points. The secure safe service replaces armored carrier pick up where feasible.

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

These services haven't been procured on a Citywide basis previously. TTX currently procures through its banking relationship, and other departments have individual contracts with armored car service providers. This agreement would consolidate these agreements and provide more City control.

D. Will the contract(s) be renewed?

Yes.

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

Not Applicable

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Armored car service provider must possess a valid license with the Bureau of Security and Investigative Services (BSIS), adequate training and experience in armored car services as well as possess a specially equipped armored car transport and secure safe equipment.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide specially equipped armored transport and secure safes that will be placed at various City locations.

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 City doesn't have a designated classification and equipment for armored car transportation services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, in addition to maintaining a valid license with BSIS, purchasing a fleet of armored car vehicles and secured safes, the City wouldn't be able to stay up to date with ever changing technology, the need for maintaining and updating the equipment.

6. Additional Information

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

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No.

- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 09/12/2013, the Department notified the following employee organizations of this PSC/RFP request:
Deputy Sheriff's Association; SF Sheriff's Managers and Supv; SFPOA - Q2-Q50; Transport Workers Union, L 200

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

Name: Greg Kato Phone: 415-554-6888 Email: greg.kato@sfgov.org

Address: 1 Dr Carlton B Goodlett Pl, Room 140 San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48592 - 13/14

DHR Analysis/Recommendation:

action date: 01/06/2014

Commission Approval Required
conditions

Approved by Civil Service Commission with

01/06/2014 DHR Approved for 01/06/2014

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT

Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 33441 13/14)

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

Type of Service: Business Consulting and Training Services for the Small Business Development Center

Funding Source: Federal – SBA and HUD

PSC Original Approved Amount: \$100,000

PSC Original Approved Duration: 07/01/14 - 06/30/16 (2 years)

PSC Mod#1 Amount: \$300,000

PSC Mod#1 Duration: 07/24/15-06/30/17 (1 year)

PSC Mod#2 Amount: \$200,000

PSC Mod#2 Duration: 07/01/17-06/30/18 (1 year)

PSC Mod#3 Amount: \$300,000

PSC Mod#3 Duration: 07/01/18-06/29/19 (52 weeks)

PSC Mod#4 Amount: \$450,000

PSC Mod#4 Duration: 06/30/19-06/30/20 (1 year 2 days)

PSC Mod#5 Amount: \$1,000,000

PSC Mod#5 Duration: 07/01/20-06/30/25 (5 years 1 day)

PSC Mod#6 Amount: \$2,000,000

PSC Mod#6 Duration: 07/01/25-06/30/27 (2 years)

PSC Cumulative Amount Proposed: \$4,350,000

PSC Cumulative Duration Proposed: 13 years 2 days

1. Description of Work

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

Contractors will provide business consulting and training services to the Small Business Development Center's (SBDC's) small business clients on an as-needed basis. SBDC is a program hosted by the City through the Office of Economic and Workforce Development (OEWD) as part of a greater network of services to help small- to medium-sized businesses grow and succeed. The Contractors' counseling services will include advice, guidance and/or instruction concerning the formation, management, financing, and operation of small business enterprises through workshops, one-on-one consulting, and loan packaging. Through a Request For Qualifications, OEWD created a pre-qualified list of 24 consultants who will remain eligible for consideration and contract negotiation on an as-needed basis for two years.

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

The SBDC Program is authorized through Congress and partially funded by the U.S. Small Business Administration (SBA). The SBA maintains agreements with, and distributes funding to, 63 SBDC Lead Centers including the Norcal SBDC Network at Humboldt State University. The Norcal SBDC Network is the collaborative partnership organization of SBDC service providers in 14 counties from Monterey to Del Norte, including San Francisco. In February 2014, OEWD was selected as the new host for the San Francisco SBDC. If this service is denied, the San Francisco SBDC program would not go forward and a new SBDC host would need to be found.

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, prior approval document is attached.

D. Will the contract(s) be renewed?
Yes, if we are awarded to continue the SBA grant.

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 Small Business Development Center (SBDC) program is funded by the Small Business Administration (SBA) and is authorized through Congress to provide services to small business owners. The SBA maintains agreements with and distributes funding to Lead Centers across the country. Since February 2014, OEWD has been contracted as the host of the SF SBDC by the NorCal SBDC Network through Humboldt State University, and in Fall 2021 the contract was renewed for another three years, leading to this modification request. Despite the lengthy authorization tenure, we believe extension is appropriate to support this program's individualized small business consulting services from a diverse pool of consultants with a wide variety of industry/sector-specific business expertise.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The work is short term, intermittent, highly specialized, and independent in nature, and there is a conflict of interest for the City and County of San Francisco to be both the regulatory host of the San Francisco SBDC and provide consulting services on behalf of the San Francisco SBDC.

B. Reason for the request for modification:

This sixth modification requests addition of two years and \$2 million to the existing authorization to provide small business consulting services to local businesses. San Francisco small business consulting utilization and expenditures have been higher in support of economic recovery efforts, and OEWD's SF SBDC host contract was just renewed for three years.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractors must have expertise in one or more of the following areas as they relate to small business operations: advertising, marketing, and branding strategies; commercial lease negotiations; customer retention and rejuvenation; financial analysis; franchising; human resource management; inventory management; loan packaging; product development; profitability tactics; retail special events; small business establishment and formation; social media management; space planning and analysis; and visual merchandizing.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 9774, Sr. Community Devl Spc 1; 9775, Sr Community Dev Spec 2;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No. Contractor will not provide facilities and/or equipment not currently possessed by the City.

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 short term, intermittent, highly specialized, and independent in nature, so it is impractical to perform by an existing civil service class. In addition, there is a conflict of interest for the City and County of San Francisco to be both the regulatory host of the San Francisco SBDC and provide consulting services on behalf of the San Francisco SBDC.
- 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 the work is short term, intermittent, highly specialized, and independent in nature, a contractor with experience can perform the work quickly and efficiently. Note that a 9775 (Senior Community Development Specialist II) will be hired to be the Director of the San Francisco SBDC.

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.
- 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.
Some of the current contractors will continue to provide services

7. **Union Notification:** On 12/30/21, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous; Prof & Tech Eng, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 33441 13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 33441 13/14 - MODIFICATIONS

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

on behalf of

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

Thu 12/30/2021 2:21 PM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; Meyers, Julie (HSA) <Julie.Meyers@sfgov.org>; thomas.vitale@seiu1021.org <thomas.vitale@seiu1021.org>; Ricardo.lopez@sfgov.org <Ricardo.lopez@sfgov.org>; Basconcillo, Katherine (PUC) <kbasconcillo@sfgwater.org>; pcamarillo_seiu@sbcglobal.net <pcamarillo_seiu@sbcglobal.net>; Wendy.Frigillana@seiu1021.org <Wendy.Frigillana@seiu1021.org>; pscreview@seiu1021.org <pscreview@seiu1021.org>; ted.zarzecki@seiu1021.net <ted.zarzecki@seiu1021.net>; davidmkersten@gmail.com <davidmkersten@gmail.com>; xiumin.li@seiu1021.org <xiumin.li@seiu1021.org>; Poon, Sin Yee (HSA) <sin.yee.poon@sfgov.org>; david.canham@seiu1021.org <david.canham@seiu1021.org>; jtanner940@aol.com <jtanner940@aol.com>; 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>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$2,000,000 for services for the period July 1, 2025 – June 30, 2027. 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/5586>

Email sent to the following addresses: L21PSCReview@ifpte21.org
 amakayan@ifpte21.org pkim@ifpte21.org kschumacher@ifpte21.org
 tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com
 jtanner940@aol.com david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org
 xiumin.li@seiu1021.org davidmkersten@gmail.com ted.zarzecki@seiu1021.net
 pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org
 pcamarillo_seiu@sbcglobal.net Kbasconcillo@sfgwater.org
 Ricardo.lopez@sfgov.org
 thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org

Additional Attachment(s)

Additional information concerning training for PSC 33441-13/14 modification request #1

The department does not anticipate that the contractors will be training City staff under this PSC. The request is for authorization to contract with successful business mentors to offer targeted and as-needed assistance to aspiring small business owners on a variety of business topics (marketing, finding space, financing, business planning, etc).

The business mentors (consultants to be contracted under the PSC) have built their knowledge through years of practical application from a combination of running their own businesses, networking/offering assistance with similar business at similar stages of start-up or growth, and formal education paths such as MBAs, targeted seminars, etc. Current City staff who are running the Small Business Development Center (SBDC) under a competitive grant program through the federal Small Business Association (SBA) have basic knowledge in these areas but are focused on the operational side of the program including marketing, outreach, triage of individual business needs, oversight of consultants, and reporting back to SBA on the effectiveness of the program.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENTDept. Code: ECNType of Request: Initial Modification of an existing PSC (PSC # 33441 13/14)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Business Consulting and Training Services for the Small Business Development CenterFunding Source: Federal – SBA and HUDPSC Original Approved Amount: \$100,000PSC Original Approved Duration: 07/01/14 - 06/30/16 (2 years)PSC Mod#1 Amount: \$300,000PSC Mod#1 Duration: 07/24/15-06/30/17 (1 year)PSC Mod#2 Amount: \$200,000PSC Mod#2 Duration: 07/01/17-06/30/18 (1 year)PSC Mod#3 Amount: \$300,000PSC Mod#3 Duration: 07/01/18-06/29/19 (52 weeks)PSC Mod#4 Amount: \$450,000PSC Mod#4 Duration: 06/30/19-06/30/20 (1 year 2 days)PSC Mod#5 Amount: \$1,000,000PSC Mod#5 Duration: 07/01/20-06/30/25 (5 years 1 day)PSC Cumulative Amount Proposed: \$2,350,000PSC Cumulative Duration Proposed: 11 years 2 days**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Contractors will provide business consulting and training services to the Small Business Development Center's (SBDC's) small business clients on an as-needed basis. SBDC is a program hosted by the City through the Office of Economic and Workforce Development (OEWD) as part of a greater network of services to help small- to medium-sized businesses grow and succeed. The Contractors' counseling services will include advice, guidance and/or instruction concerning the formation, management, financing, and operation of small business enterprises through workshops, one-on-one consulting, and loan packaging. Through a Request For Qualifications, OEWD created a pre-qualified list of 24 consultants who will remain eligible for consideration and contract negotiation on an as-needed basis for two years.

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

The SBDC Program is authorized through Congress and partially funded by the U.S. Small Business Administration (SBA). The SBA maintains agreements with, and distributes funding to, 63 SBDC Lead Centers including the Norcal SBDC Network at Humboldt State University. The Norcal SBDC Network is the collaborative partnership organization of SBDC service providers in 14 counties from Monterey to Del Norte, including San Francisco. In February 2014, OEWD was selected as the new host for the San Francisco SBDC. If this service is denied, the San Francisco SBDC program would not go forward and a new SBDC host would need to be found.

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 - all prior approvals attached

D. Will the contract(s) be renewed?

Yes, if we are awarded to continue the SBA grant.

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 Department conducts a Request for Qualifications (RFQ) at least once every two years for these services, which expanded the consultant pool and increase the available options for specialized business services. While federal funding for this program is not guaranteed, the Department is committed to ensuring that these services can continue for emerging and struggling San Francisco businesses.

2. Reason(s) for the Request

A. Display all that apply

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).

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

Explain the qualifying circumstances:

The work is short term, intermittent, highly specialized, and independent in nature, and there is a conflict of interest for the City and County of San Francisco to be both the regulatory host of the San Francisco SBDC and provide consulting services on behalf of the San Francisco SBDC.

B. Reason for the request for modification:

Additional dollars are being requested as well as an extension on the authorization for five (5) additional program years. This authorization will enable the department to continue offering essential services to an expanding list of local businesses in need of assistance through the Small Business Development Center (SBDC).

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractors must have expertise in one or more of the following areas as they relate to small business operations: advertising, marketing, and branding strategies; commercial lease negotiations; customer retention and rejuvenation; financial analysis; franchising; human resource management; inventory management; loan packaging; product development; profitability tactics; retail special events; small business establishment and formation; social media management; space planning and analysis; and visual merchandizing.

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 9774, Sr. Community Devl Spc 1; 9775, Sr Community Dev Spec 2;

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

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 short term, intermittent, highly specialized, and independent in nature, so it is impractical to perform by an existing civil service class. In addition, there is a conflict of interest for the City and County of San Francisco to be both the regulatory host of the San Francisco SBDC and provide consulting services on behalf of the San Francisco SBDC.

- 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 the work is short term, intermittent, highly specialized, and independent in nature, a contractor with experience can perform the work quickly and efficiently. Note that a 9775 (Senior Community Development Specialist II) will be hired to be the Director of the San Francisco SBDC.

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.

- 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.

Some of the current contractors will continue to provide services

7. Union Notification: On 01/14/19, the Department notified the following employee organizations of this PSC/RFP request:

SEIU 1021 Miscellaneous; Prof & Tech Eng, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 33441 13/14

DHR Analysis/Recommendation:

04/15/2019

Commission Approval Required
conditions

Approved by Civil Service Commission with

04/15/2019 DHR Approved for 04/15/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR

Dept. Code: MYR

Type of Request: Initial Modification of an existing PSC (PSC # 40166 - 17/18)

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

Type of Service: State Legislative Representation

Funding Source: General Fund

PSC Original Approved Amount: \$550,000

PSC Original Approved Duration: 11/01/17 - 10/31/19 (1 year 52 weeks)

PSC Mod#1 Amount: \$276,000

PSC Mod#1 Duration: 11/01/19-10/31/20 (1 year 1 day)

PSC Mod#2 Amount: \$276,000

PSC Mod#2 Duration: 11/01/20-12/31/21 (1 year 8 weeks)

PSC Mod#3 Amount: \$828,000

PSC Mod#3 Duration: 01/01/22-12/31/24 (3 years 1 day)

PSC Cumulative Amount Proposed: \$1,930,000

PSC Cumulative Duration Proposed: 7 years 8 weeks

1. Description of Work

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

To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.

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

State legislation and regulatory actions have significant and profound impact on the budget of the City and the legal requirements used by City departments. Effective advocacy for the city in the nations' capital is critical to advancing and securing the City's interests, particularly on federal appropriation issues.

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 PSC 40166-17/18

D. Will the contract(s) be renewed?

Unknown at this time

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
Ongoing needed lobbying service until the end of Mayoral term.

2. Reason(s) for the Request

- A. Display all that apply

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

Explain the qualifying circumstances:

Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

- B. Reason for the request for modification:

To add more duration and money until the end of the Mayor's term.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Extensive experience successfully representing municipal agencies on state legislative and regulatory issues. They must demonstrate a deep understanding of budget, legislative, regulator, and political issues in state government, and must demonstrate a clear record of success advocating for clients. They must also demonstrate a clear understanding of San Francisco's needs for state representation. They must perform most of their duties in Sacramento, California
- 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: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
While civil service classes perform legislative and policy analysis, they do not have the breadth of knowledge, skills. Legislative/state government contacts and expertise are required to effectively advocate for the City's state legislative agenda. Additionally, the work performed is on an as-need basis in Sacramento, California, when action on legislation or regulation important to San Francisco 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: Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current

legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

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, the department will not receive training, this work is conducted in Sacramento as it utilizes relationships in the State Capitol.

- 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 02/28/22, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Daniella Mattias Phone: 415-554-6486 Email: daniella.mattias@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40166 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of daniella.mattias@sfgov.org
Sent: Monday, February 28, 2022 9:58 AM
To: Mattias, Daniella (MYR); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 40166 - 17/18 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The MAYOR -- MYR has submitted a modification request for a Personal Services Contract (PSC) for \$828,000 for services for the period January 1, 2022 – 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/13929>

Email sent to the following addresses: L21PSCReview@ifpte21.org pkim@ifpte21.org eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ecassidy@ifpte21.com

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR

Dept. Code: MYR

Type of Request: Initial Modification of an existing PSC (PSC # 40166 - 17/18)

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

Type of Service: State Legislative Representation

Funding Source: General Fund

PSC Original Approved Amount: \$550,000 PSC Original Approved Duration: 11/01/17 - 10/31/19 (1 year 52 weeks)

PSC Mod#1 Amount: \$276,000 PSC Mod#1 Duration: 11/01/19-10/31/20 (1 year 1 day)

PSC Mod#2 Amount: \$276,000 PSC Mod#2 Duration: 11/01/20-12/31/21 (1 year 8 weeks)

PSC Cumulative Amount Proposed: \$1,102,000 PSC Cumulative Duration Proposed: 4 years 8 weeks

1. Description of Work

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

To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.

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

State legislation and regulatory actions have significant and profound impact on the budget of the City and the legal requirements used by City departments. Effective advocacy for the city in the nations' capital is critical to advancing and securing the City's interests, particularly on federal appropriation issues.

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 under last modification

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

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

B. Reason for the request for modification:
Contract extension

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Extensive experience successfully representing municipal agencies on state legislative and regulatory issues. They must demonstrate a deep understanding of budget, legislative, regulator, and political issues in state government, and must demonstrate a clear record of success advocating for clients. They must also demonstrate a clear understanding of San Francisco's needs for state representation. They must perform most of their duties in Sacramento, California
- 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: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
While civil service classes perform legislative and policy analysis, they do not have the breadth of knowledge, skills. Legislative/state government contacts and expertise are required to effectively advocate for the City's state legislative agenda. Additionally, the work performed is on an as-need basis in Sacramento, California, when action on legislation or regulation important to San Francisco 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: Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

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, the department will not receive training, this work is conducted in Sacramento as it utilizes relationships in the State Capitol.
- 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 02/12/21, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;**

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

Name: Daniella Mattias Phone: 415-554-6486 Email: daniella.mattias@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40166 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/22/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR

Dept. Code: MYR

Type of Request: Initial Modification of an existing PSC (PSC # 40166 - 17/18)

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

Type of Service: State Legislative Representation

Funding Source: General Fund

PSC Original Approved Amount: \$550,000 PSC Original Approved Duration: 11/01/17 - 10/31/19 (1 year 52 weeks)

PSC Mod#1 Amount: \$276,000 PSC Mod#1 Duration: 11/01/19-10/31/20 (1 year 1 day)

PSC Cumulative Amount Proposed: \$826,000 PSC Cumulative Duration Proposed: 3 years

1. Description of Work

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

To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.

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

State legislation and regulatory actions have significant and profound impact on the budget of the City and the legal requirements used by City departments. Effective advocacy for the city in the nations' capital is critical to advancing and securing the City's interests, particularly on federal appropriation issues.

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

Services have been provided in the past through earlier PSC request. See 40166 - 17/18

D. Will the contract(s) be renewed?

Unknown at this time

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

B. Reason for the request for modification:

The Mayor's Office is requesting an increase to fund a 1 year contract extension. The current rate is \$23,000 per month for a total of \$276,000 for one more year.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Extensive experience successfully representing municipal agencies on state legislative and regulatory issues. They must demonstrate a deep understanding of budget, legislative, regulator, and political issues in state government, and must demonstrate a clear record of success advocating for clients. They must also demonstrate a clear understanding of San Francisco's needs for state representation. They must perform most of their duties in Sacramento, California
- 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: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
While civil service classes perform legislative and policy analysis, they do not have the breadth of knowledge, skills. Legislative/state government contacts and expertise are required to effectively advocate for the City's state legislative agenda. Additionally, the work performed is on an as-need basis in Sacramento, California, when action on legislation or regulation important to San Francisco 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: Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

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, the department will not receive training, this work is conducted in Sacramento as it utilizes relationships in the State Capitol.
- 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 09/10/19, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;**

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

Name: Daniella Mattias Phone: 415-554-6486 Email: daniella.mattias@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40166 - 17/18

DHR Analysis/Recommendation:

11/04/2019

Commission Approval Required

Approved by Civil Service Commission

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY

Dept. Code: TIS

Type of Request: Initial Modification of an existing PSC (PSC # 49622 - 18/19)

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

Type of Service: Installation, Configuration and Modification Services for Jail Management Software

Funding Source: General Fund

PSC Original Approved Amount: \$500,000

PSC Original Approved Duration: 04/01/19 - 03/31/21 (2 years)

PSC Mod#1 Amount: \$618,277

PSC Mod#1 Duration: 04/01/21-03/31/22 (1 year)

PSC Mod#2 Amount: \$776,696

PSC Mod#2 Duration: 04/01/22-03/31/24 (2 years 1 day)

PSC Cumulative Amount Proposed: \$1,894,973

PSC Cumulative Duration Proposed: 5 years 1 day

1. Description of Work

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

Vendor will install a Jail Management System (JMS) and to work with San Francisco Sheriff Department Information Technology Support Services Staff (ITSS) to configure a prototype of the Inmate Booking Module in JMS. This service shall include a subscription to use the JMS software in conjunction with the San Francisco Sheriff Department existing Microsoft Dynamic CRM licenses. The prototype would be used by San Francisco Sheriff Department in a non-production environment for the duration of the subscription (12 months) in order to confirm that Vendor's JMS will meet the jail management system needs of San Francisco Sheriff Department.

The scope, assumptions, and costs presented in this SOW represent Vendor proprietary experience and knowledge.

A. Project Scope

Vendor will work with San Francisco Sheriff Department to install Offender360 JMS and all technology components associated with the software in a non-production San Francisco Sheriff Department environment on their server hardware. Vendor will conduct a series of training workshops with San Francisco Sheriff Department Information Technology Staff to enable San Francisco Sheriff Department To make configuration changes to the standard JMS Booking module and develop a non-production prototype that meets the specific business requirements of San Francisco Sheriff Department for the booking process. Vendor will include in the services a 12 month subscription of the Offender360 JMS software to allow San Francisco Sheriff Department users to test the application in a non-production environment for up to 12 months. The result of this project will provide a prototype that will enable San Francisco Sheriff Department to validate and confirm that Offender360 will meet the jail management system needs of San Francisco Sheriff Department.

B. Explain why this service is necessary and the consequence of denial:
The software is proprietary and the manufacturer is the owner of the source codes. Furthermore, the City loses the right to support services from the manufacturer if the software is modified without oversight by Tyler Technologies. These services include a) correcting any errors, defects or malfunctions to the system; b) telephone and/or online support concerning the installation and use of its software; c) training in the installation and use of the software; d) on-site consulting and application development services.

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.
MOD #1 PSC 49622-18/19

D. Will the contract(s) be renewed?
Yes, it is a possibility.

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:
Tyler Contract No. 1000016039 provided an original term of two (2) years, April 1, 2019 to March 31, 2021, with an option to extend terms for one (1) additional year.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The software is proprietary and the manufacturer is the owner of the source codes. Furthermore, the City loses the right to support services from the manufacture, if the software is modified without oversight by vendor. These services include, but not limited to a) correcting any errors, defects or malfunctions to the system; b) telephone and/or online support concerning the installation and use of its software; c) training in the installation and use of the software; d) on-site consulting and application development services.

B. Reason for the request for modification:

The Sheriff's Office is proposing to exercise the option to extend the existing Tyler Jail Management System (JMS) Contract (No. 1000016039) for two (2) additional years for Maintenance and Support. Extending the Maintenance and Support will allow the Sheriff Office to complete the transition of the antiquated Tyler Jail Management System to DXC Eclipse Jail Management System. Phase 1 of the DXC JMS Implementation Project began in October 2021. Phase II of the DXC JMS Project is tentatively schedule to begin in April 2022. This PSC Modification will increase the contract amount by \$388,348 annually over the next two years. The net contract amount will increase from \$1,118,277 to \$1,894,973.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Very specific working knowledge of the vendor's Jail Management System software platform and a solid understanding of the business processes in the Sheriff's Department.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
The vendor is the manufacturer of the software and the software is proprietary to the manufacturer.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the classes exists, but City employees do not have access to the proprietary software source codes to complete any configuration. If the City does configure the software, it nullifies its access to support and service from the vendor.

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.
Contractor shall provide System Administrative and Technical training to enable the City's IT staff to successfully configure and manage Offender360 JMS in their respective roles and responsibilities. a) Vendor will train up to eight (8) San Francisco Sheriff Department staff members b) Training will include four (4) two (2) day Workshops that will cover all necessary topics associated with IT Administrator Training for San Francisco Sheriff Department Staff to perform the following with assistance from Vendor. Additional training may be provided through web conferences if mutually agreed. c) Training Workshops will be conducted onsite at San Francisco Sheriff Department facilities to provide the following: i. Knowledge transfer, training, and documentation to allow in-house City IT staff to easily enhance and support the new system and technologies going forward; ii. Configure the JMS Booking module prototype to business requirements specification iii. Ability to update Prototype per San Francisco Sheriff Department stakeholder feedback. d) Vendor will provide all necessary training and classroom materials.
- 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, Tyler provides the proprietary Maintenance and Support.

7. **Union Notification:** On 02/24/22, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: One South Van Ness Avenue, 2nd Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49622 - 18/19

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 04/04/2022

Civil Service Commission Action:

Receipt of Union Notification(s)

Gong, Henry (SHF)

From: dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org
Sent: Thursday, February 24, 2022 1:21 PM
To: Gong, Henry (SHF); ecassidy@ifpte21.com; WendyWong26@yahoo.com;
wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org;
kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org;
L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 49622 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a modification request for a Personal Services Contract (PSC) for \$776,696 for services for the period April 1, 2022 – March 31, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/15778>

Email sent to the following addresses: L21PSCReview@ifpte21.org pkim@ifpte21.org eerbach@ifpte21.org
kpage@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com
WendyWong26@yahoo.com ecassidy@ifpte21.com

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGYDept. Code: TISType of Request: Initial Modification of an existing PSC (PSC # 49622 - 18/19)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Installation, Configuration and Modification Services for Jail Management SoftwareFunding Source: General FundPSC Original Approved Amount: \$500,000PSC Original Approved Duration: 04/01/19 - 03/31/21 (2 years)PSC Mod#1 Amount: \$618,277PSC Mod#1 Duration: 04/01/21-03/31/22 (1 year)PSC Cumulative Amount Proposed: \$1,118,277PSC Cumulative Duration Proposed: 3 years**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Vendor will install a Jail Management System (JMS) and to work with San Francisco Sheriff Department Information Technology Support Services Staff (ITSS) to configure a prototype of the Inmate Booking Module in JMS. This service shall include a subscription to use the JMS software in conjunction with the San Francisco Sheriff Department existing Microsoft Dynamic CRM licenses. The prototype would be used by San Francisco Sheriff Department in a non-production environment for the duration of the subscription (12 months) in order to confirm that Vendor's JMS will meet the jail management system needs of San Francisco Sheriff Department.

The scope, assumptions, and costs presented in this SOW represent Vendor proprietary experience and knowledge.

A. Project Scope

Vendor will work with San Francisco Sheriff Department to install Offender360 JMS and all technology components associated with the software in a non-production San Francisco Sheriff Department environment on their server hardware. Vendor will conduct a series of training workshops with San Francisco Sheriff Department Information Technology Staff to enable San Francisco Sheriff Department To make configuration changes to the standard JMS Booking module and develop a non-production prototype that meets the specific business requirements of San Francisco Sheriff Department for the booking process. Vendor will include in the services a 12 month subscription of the Offender360 JMS software to allow San Francisco Sheriff Department users to test the application in a non-production environment for up to 12 months. The result of this project will provide a prototype that will enable San Francisco Sheriff Department to validate and confirm that Offender360 will meet the jail management system needs of San Francisco Sheriff Department.

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

The software is proprietary and the manufacturer is the owner of the source codes. Furthermore, the City loses the right to support services from the manufacturer if the software is modified without oversight by Tyler Technologies. These services include a) correcting any errors, defects or malfunctions to the system; b) telephone and/or online support concerning the installation and use of its software; c) training in the installation and use of the software; d) on-site consulting and application development services.

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, under PSC 49622-18/19.

D. Will the contract(s) be renewed?

Yes, it is a possibility.

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:

Tyler Contract No. 1000016039 provided an original term of two (2) years, April 1, 2019 to March 31, 2021, with an option to extend terms for one (1) additional year.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The software is proprietary and the manufacturer is the owner of the source codes. Furthermore, the City loses the right to support services from the manufacture, if the software is modified without oversight by vendor. These services include, but not limited to a) correcting any errors, defects or malfunctions to the system; b) telephone and/or online support concerning the installation and use of its software; c) training in the installation and use of the software; d) on-site consulting and application development services.

B. Reason for the request for modification:

Amend the existing Tyler Contract (No. 1000016039) to exercise an option for additional one (1) year terms for Maintenance and Support, per Exhibit C - Maintenance and Support Agreement. Exercising the 1 year extension the will allow the Sheriff's Office to facilitate the procurement and implementation of a modern and efficient Jail Management System (JMS) to replace Tyler. The new JMS will meet the Corrections Technology Association's (CTA) correctional standards for information management systems. This PSC Modification will also correct the aggregate contract amount to \$1,118,277. The original PSC contract amount of \$500,000 should have been \$748,422, the actual Maintenance and Support amount for years 1 and 2.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Very specific working knowledge of the vendor's Jail Management System software platform and a solid understanding of the business processes in the Sheriff's Department.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
The vendor is the manufacturer of the software and the software is proprietary to the manufacturer.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the classes exists, but City employees do not have access to the proprietary software source codes to complete any configuration. If the City does configure the software, it nullifies its access to support and service from the vendor.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Training is not applicable.
- 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, Tyler provides the proprietary Maintenance and Support.

7. **Union Notification:** On 12/04/20, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: One South Van Ness Avenue, 2nd Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49622 - 18/19

DHR Analysis/Recommendation:

01/04/2021

Commission Approval Required

Approved by Civil Service Commission

01/04/2021 DHR Approved for 01/04/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ADULT PROBATION

Dept. Code: ADP

Type of Request: Initial Modification of an existing PSC (PSC # 49068 - 14/15)

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

Type of Service: Professional services, licenses, and maintenance of a proprietary application software.

Funding Source: General Fund

PSC Original Approved Amount: \$2,000,000

PSC Original Approved Duration: 09/01/15 - 08/31/20 (5 years 1 day)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$1,500,000

PSC Mod#2 Duration: 09/01/20-06/30/21 (43 weeks 2 days)

PSC Mod#3 Amount: no amount added

PSC Mod#3 Duration: 07/01/21-05/31/23 (1 year 47 weeks)

PSC Cumulative Amount Proposed: \$3,500,000

PSC Cumulative Duration Proposed: 7 years 39 weeks

1. Description of Work

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

Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize SYSCON's (Vendor) existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice.

Scope Change

Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize Vendor's existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice.

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

The use of Vendor's products and services will ensure the APD's compliance with data collection required by Assembly Bill 109 (AB109) and Senate Bill 678 (SB678), and any future legal mandates for data. It will also provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice. The California Department of Justice Supervise Release File is currently based on Contractors data. APD's current software (provided by Vendor) can electronically deliver data to the California Department of Justice's Supervise Release File (SRF). See attachment for more information.

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

Services have been provided in the past through earlier PSC request. See 49068 - 14/15

D. Will the contract(s) be renewed?

Depending on performance.

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

This PSC is for the continuation of enhancing SFAPD's case management system for the Adult Probation Department (SFAPD). The case management system will utilize Vendor's existing data mappings to SFAPD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice. The need for these services is ongoing and extends beyond five years.

2. Reason(s) for the Request

A. Display all that apply

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.

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

Explain the qualifying circumstances:

APD has used Vendor's case management system software since 2003 through the City Administrator's Office JUSTIS program. APD seeks its own stand-alone agreement for a software upgrade for APD utilizing Vendor's existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The use of Vendor's products and services will ensure the APD's compliance with data collection required by Assembly Bill 109 (AB109) and Senate Bill 678 (SB678). It will also provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice. The California Department of Justice Supervise Release File is currently based on Vendor data.

B. Reason for the request for modification:

To extend the PSC duration, to be able to continue existing contract obligations. Also, we are in the process of executing an assignment agreement, whereby the current vendor's existing contractual obligations (transferor) will transfer to a new vendor (transferee).

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Software engineering.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This application software is proprietary and the Vendor has not authorized any third party to provide products or services related to its software.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The proprietary nature of the application software doesn't allow for any third party to 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 contact? If so, please explain what that will entail; if not, explain why not.

See attachment.

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 03/04/22, 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: Elisa Baeza Phone: 4155531691 Email: elisa.baeza@sfgov.org

Address: 880 Bryant Street Room 200, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49068 - 14/15

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/04/2022

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhr-psccoordinator@sfgov.org on behalf of elisa.baeza@sfgov.org
To: [PSC RECEIPT of Modification notification sent to Unions and DHR](mailto:Baeza, Elisa (ADP); kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marengo; pwilson@twusf.org; 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; @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; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Martinez, Veronica (ADP); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 49068 - 14/15 - MODIFICATIONS
Date: Friday, March 4, 2022 3:17:21 PM</p><hr/></div><div data-bbox=)

The ADULT PROBATION -- ADP has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1, 2021 – August 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/6284>

Email sent to the following addresses: L21PSCReview@ifpte21.org
pkim@ifpte21.org
eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org
tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com
ecassidy@ifpte21.com junko.laxamana@sfgov.org

Additional Attachment(s)

For all PSCs if the duration requested is 5 years or more, an explanation is required- historical PSC required:

This PSC is for the procurement of a software application to manage comprehensive data from the Adult Probation Department (APD). The need to store and manage data using this software application is ongoing and extends beyond five years.

1B. Explain why this service is necessary and the consequences of denial:

Denial of this request will prevent APD from: 1. effectively and efficiently complying with various California laws that mandate the sharing of APD data with the State and law enforcement agencies; 2. updating a legacy application, to ensure critical functionality for departmental operations; and it will disadvantage APD's ability to collect and share data for its own decision-making; other City departments, the Court, and California jurisdictions, including the California Department of Justice.

5B. Describe Training including number of hours. Indicate occupational type of employees. If no training, please explain:

The vendor will provide training on the configuration of the software to approximately 6 staff members. In addition the vendor will provide user training to probation officers as requested by APD.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ADULT PROBATION

Dept. Code: ADP

Type of Request: Initial Modification of an existing PSC (PSC # 49068 - 14/15)

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

Type of Service: Professional services, licenses, and maintenance of a proprietary application software.

Funding Source: General Fund

PSC Original Approved Amount: \$2,000,000 PSC Original Approved Duration: 09/01/15 - 08/31/20 (5 years 1 day).

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$1,500,000 PSC Mod#2 Duration: 09/01/20-06/30/21 (43 weeks 2 days).

PSC Cumulative Amount Proposed: \$3,500,000 PSC Cumulative Duration Proposed: 5 years 43 weeks

1. Description of Work

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

Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize SYSCON's (Vendor) existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice.

Scope Change

Software upgrade of an existing case management system for the Adult Probation Department (APD). The system will utilize Vendor's existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The system will provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice.

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

The use of Vendor's products and services will ensure the APD's compliance with data collection required by Assembly Bill 109 (AB109) and Senate Bill 678 (SB678), and any future legal mandates for data. It will also provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice. The California Department of Justice Supervise Release File is currently based on Contractors data. APD's current software (provided by Vendor) can electronically deliver data to the California Department of Justice's Supervise Release File (SRF). See attachment for more information.

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 service has not been provided in the past

D. Will the contract(s) be renewed?

Depending on performance.

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

This PSC is for the procurement of a software application to manage comprehensive data from the Adult Probation Department (APD). The need to store and manage data using this software application is ongoing and extends beyond five years.

2. Reason(s) for the Request

A. Display all that apply

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.

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

Explain the qualifying circumstances:

APD has used Vendor's case management system software since 2003 through the City Administrator's Office JUSTIS program. APD seeks its own stand-alone agreement for a software upgrade for APD utilizing Vendor's existing data mappings to APD's business processes and then for subsequent maintenance of the upgraded software. The use of Vendor's products and services will ensure the APD's compliance with data collection required by Assembly Bill 109 (AB109) and Senate Bill 678 (SB678). It will also provide the ability to interface with other City departments and other California jurisdictions, including the California Department of Justice. The California Department of Justice Supervise Release File is currently based on Vendor data.

B. Reason for the request for modification:

To increase PSC amount and duration. The Case Management solution requires additional features that will increase the total contract amount. The contract has not been approved yet, thus a PSC duration extension is needed so that we can execute the contract with a five-year term.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Software engineering.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This application software is proprietary and the Vendor has not authorized any third party to provide products or services related to its software.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The proprietary nature of the application software doesn't allow for any third party to 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 contact? If so, please explain what that will entail; if not, explain why not.
See attachment.
- 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 02/25/16, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Phone: Email:

Address: 880 Bryant Street Room 200, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49068 - 14/15

DHR Analysis/Recommendation:

04/04/2016

Commission Approval Required

Approved by Civil Service Commission

04/04/2016 DHR Approved for 04/04/2016

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE

Dept. Code: POL

Type of Request: Initial Modification of an existing PSC (PSC # 39380 - 15/16)

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

Type of Service: Evidence Storage Freezer and Refrigerator Maintenance

Funding Source: General Fund

PSC Original Approved Amount: \$100,000

PSC Original Approved Duration: 03/01/17 - 02/28/21 (4 years)

PSC Mod#1 Amount: \$40,000

PSC Mod#1 Duration: 05/01/22-04/30/24 (3 years 8 weeks)

PSC Mod#2 Amount: no amount added

PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$140,000

PSC Cumulative Duration Proposed: 7 years 8 weeks

1. Description of Work

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

The contractor will provide emergency repair services and preventative maintenance and parts for the San Francisco Police Department's 16 freezers and 6 refrigerators which store evidence. A list of equipment is attached.

Scope Change

Contractor will no longer perform preventative maintenance work. Contractor will be contacted for urgent repairs requiring a 4-hour window response only.

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

This service is necessary in order to ensure that evidence will be preserved properly. If the freezers or refrigerators malfunction and are not repaired, evidence may not be preserved properly and may not be useful in prosecution cases.

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

Services have been provided in the past through earlier PSC request. See 39380 - 15/16

D. Will the contract(s) be renewed?

It will likely need to be renewed.

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:

contractor work needs to continue

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Services are as-needed.

B. Reason for the request for modification:

Extend PSC by two years

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor must be experienced in immediately repairing and providing parts for industrial refrigerators and freezers (including walk-in freezers). Contractor staff will have certifications to repair freezers and refrigerators of manufacturers.

B. Which, if any, civil service class(es) normally perform(s) this work? 7205, Chief Stationary Engineer; 7333, Apprentice Stationary Engineer; 7334, Stationary Engineer; 7335, Senior Stationary Engineer;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will need to provide parts to repair and maintain evidence storage freezers and refrigerators.

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.

We were not able to identify any City staff with manufacturer certificates to perform the work. This service is as-needed and can occur during non-business hours. We anticipate making no more than 12 emergency service calls per year.

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 service is as-needed. We anticipate making no more than 12 emergency service calls per year. Due to new Department of Justice best practices guidelines, the San Francisco Police Department anticipates revising policies which will reduce the need for freezing evidence and reduce need for freezers.

6. Additional Information

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

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

Training will not be necessary.

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. Need contractor to continue urgent repair work.

7. **Union Notification:** On 02/25/22, 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: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 1245 - 3rd Street, 6th Floor, San Francisco, CA 94158

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 39380 - 15/16

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/04/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of Genie.Wong@sfgov.org
To: [Wong, Genie \(POL\); seichenberger@local39.org; MRainsford@local39.org; grojo@local39.org; DHR-PSCCoordinator, DHR \(HRD\)](mailto:Wong, Genie (POL); seichenberger@local39.org; MRainsford@local39.org; grojo@local39.org; DHR-PSCCoordinator, DHR (HRD))
Subject: Receipt of Modification Request to PSC # 39380 - 15/16 - MODIFICATIONS
Date: Friday, February 25, 2022 11:23:37 AM

PSC RECEIPT of Modification notification sent to Unions and DHR

The POLICE -- POL has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period May 1, 2022 – April 30, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/16004>

Email sent to the following addresses: grojo@local39.org
MRainsford@Local39.org
seichenberger@local39.org

From: Stan Eichenberger
To: [Wong, Genie \(P3\)](#)
Cc: [High PSC Coordinator - DHR \(HRD\)](#); [CulService, Cui \(P3\)](#); [Blow, Dennis \(HRD\)](#); [Wright, Jonathan \(HRD\)](#); [Leung, Patrick \(P3\)](#)
Subject: RE: Receipt of Modification Request to PSC # 39380 - 15/16 - MODIFICATIONS
Date: Thursday, March 3, 2022 4:46:34 PM
Attachments: [39380 - 15/16 - MODIFICATIONS.pdf](#)
[SEIU and PSC Modification - Firearm and Refrigerator Equipment Maintenance.mpg](#)
[39380 and PSC Modification - Firearm and Refrigerator Equipment Maintenance.mpg](#)

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

Hi Genie,

Local 39 is in receipt of the POL request to extend the current PSC term by two additional years without an increase in the PSC amount. The Union is amenable to granting the requested two-year extension based on the attached email communications and for services that include only urgent repairs requiring service within a 4-hour window 24/7/365. Local requests that all services, preventative, urgent or otherwise, be performed by City workers after this two-year extension.

Please let me know if you should have any questions.

Thanks,

Stan Eichenberger
Business Representative
IUOE - Stationary Engineers, Local 39

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

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of Genie Wong <gwong@sfgov.org>
Sent: Friday, February 25, 2022 11:37 AM
To: Genie Wong <gwong@sfgov.org>; Stan Eichenberger <seichenberger@local39.org>; Michael Rainsford <m rainsford@local39.org>; grojo@local39.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 39380 - 15/16 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The POLICE – POL has submitted a modification request for a Personal Services Contract (PSC) for 50 for services for the period May 1, 2022 – April 30, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<https://url.avamam.click/v2/> <http://apps.sfgov.org/dhrdupal/node/16004> [_YXAsOnNmZHOzOmE6bzmmMjRlNWxNTlNTlHlWQ3YmQ4ODQlNDU1OGRlbnNy5MjoiOmNmYjI6MWEzZmNlNDU0Yml0MjY2ZmNkNGl4OTRlNGU4ZmJlZlU0M2YxNGZlZmNlMzA1S2hmMFE4MjYk4YTww0k4](#)
Email sent to the following addresses: grojo@local39.org MRainsford@Local39.org seichenberger@local39.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICEDept. Code: POL

Type of Request: Initial Modification of an existing PSC (PSC # 39380 - 15/16)

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

Type of Service: Evidence Storage Freezer and Refrigerator MaintenanceFunding Source: General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 03/01/17 - 02/28/21 (4 years)

PSC Mod#1 Amount: \$40,000 PSC Mod#1 Duration: 05/01/21-04/30/23 (2 years 8 weeks)

PSC Cumulative Amount Proposed: \$140,000 PSC Cumulative Duration Proposed: 6 years 8 weeks

1. Description of Work

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

The contractor will provide emergency repair services and preventative maintenance and parts for the San Francisco Police Department's 16 freezers and 6 refrigerators which store evidence. A list of equipment is attached.

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

This service is necessary in order to ensure that evidence will be preserved properly. If the freezers or refrigerators malfunction and are not repaired, evidence may not be preserved properly and may not be useful in prosecution cases.

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

Services have been provided in the past through earlier PSC request. See 39380 - 15/16

D. Will the contract(s) be renewed?

It will likely need to be renewed.

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:

Contractor continues to be needed to maintain the Police Department's walk-in freezers and refrigerators to preserve evidence.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Services are as-needed.

- B. Reason for the request for modification:
extend contract to continue work

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contractor must be experienced in immediately repairing and providing parts for industrial refrigerators and freezers (including walk-in freezers). Contractor staff will have certifications to repair freezers and refrigerators of manufacturers.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7205, Chief Stationary Engineer; 7333, Apprentice Stationary Engineer; 7334, Stationary Engineer; 7335, Senior Stationary Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will need to provide parts to repair and maintain evidence storage freezers and refrigerators.

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.
We were not able to identify any City staff with manufacturer certificates to perform the work. This service is as-needed and can occur during non-business hours. We anticipate making no more than 12 emergency service calls per year.
- 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 service is as-needed. We anticipate making no more than 12 emergency service calls per year. Due to new Department of Justice best practices guidelines, the San Francisco Police Department anticipates revising policies which will reduce the need for freezing evidence and reduce need for freezers.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Training will not be necessary.
- 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.
Need contractor to continue work.

7. Union Notification: On 01/28/21, 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: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 1245 - 3rd Street, 6th Floor, San Francisco, CA 94158

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 39380 - 15/16

DHR Analysis/Recommendation:

05/17/2021

Commission Approval Required
conditions

Approved by Civil Service Commission with

05/17/2021 DHR Approved for 05/17/2021