



London Breed  
Mayor

Carol Isen  
Human Resources Director

Date: November 4, 2022

To: The Honorable Civil Service Commission

Through: Carol Isen  
Human Resources Director

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Subject: **Personal Services Contracts Approval Request**

This report contains twenty-three (23) 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 22/23 to date:

Total of this Report	YTD Expedited Approvals FY2022-2023	Total for FY2022-2023
\$112,616,692	\$118,301,715	\$1,191,414,443

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# POSTING FOR

November 21, 2022

## PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
<a href="#">41818 - 22/23</a>	AIRPORT COMMISSION	\$200,000.00	The San Francisco International Airport (Airport) requires a contractor to provide as-needed and intermittent training to the San Francisco Police Department - Airport Bureau (SFPD-AB) police service canines (K-9) and their handlers on explosives detection in accordance with the latest Transportation Security Administration (TSA) standards and important alert notices.	January 1, 2023	June 30, 2026	REGULAR
<a href="#">47770 - 22/23</a>	AIRPORT COMMISSION	\$7,500,000.00	The San Francisco International Airport ("SFO" or "Airport") requires international marketing consultants to perform services in overseas locations to increase international flight activity and to support the current airline service providers at SFO. Consultants will develop and execute marketing programs, promote SFO's new flights, provide market research support based on their respective region, strategic planning and execution of campaigns for SFO with airlines and industry partners to attract new and retain airlines at SFO. These services also include securing and arranging new partnerships with airlines and/or travel trade partners to promote new and existing air service to SFO in the following regions: Asia, Europe, Latin America, and Oceania. Consultants will provide a staff representative in the international marketing industry in each of these regions.	January 1, 2023	December 31, 2027	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
<u>40013 - 22/23</u>	ASSESSOR / RECORDER	\$500,000.00	<p>The Office of the Assessor-Recorder (ASR) has an existing contract with BMI Imaging Systems Inc. (BMI) to host approximately 15.1 million pages of documents that were recorded between 1906 and 1999. BMI's proprietary platform Digital ReelL is the portal through which members of the public can view and request copies of these archived records.</p> <p>In 2021, the California Legislature approved Assembly Bill 1466 (AB1466) which requires all California Counties to redact from deeds and other property documents any language that is discriminatory or racially restrictive. To achieve this legislated mandate, ASR would like to enter into a new professional services contract with BMI to upgrade the existing software, enable search capability for this restrictive language, and subsequently redact inappropriate content. The estimated contract value is \$280,000 but may increase up to \$500,000 during contract negotiations; the initial contract term is four (4) years with two (2) one-year options to extend for one year each.</p> <p>As part of this software upgrade, historical records will be searched using optical character recognition (OCR) technology to identify unlawfully Restrictive Covenants. Once identified, BMI will perform a manual review of each suspected Restricted Covenant for accuracy, and will manually data enter key document details and page locations within the recorded document where terms were found. Once identified, BMI will route the documents through a secure AB-1466 website which can be accessed by both ASR and the City Attorney for further processing. The City Attorney's Office will review and approve the proposed changes in the software, and ASR will re-record the original document with the illegal</p>	January 1, 2023	December 31, 2028	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			language redacted. Furthermore, this system upgrade would allow ASR to meet the reporting requirement which his required by the legislation.			
<a href="#">46672 - 22/23</a>	GENERAL SERVICES AGENCY - CITY ADMIN	\$750,000.00	Contractors shall provide set-up/installation and break-down services of barricades, fencing, and other crowd and traffic safety equipment that are rented, and at times, may be purchased by City departments, to ensure public safety during various special events (e.g., Pride Parade, Warriors championship parade, Fleet Week) and for other circumstances, including street/sewer paving and repair, vehicular accidents, etc. that require temporary crowd and/or traffic safety control measures.	October 18, 2022	October 17, 2027	REGULAR
<a href="#">43920 - 22/23</a>	CITY PLANNING	\$9,500,000.00	The San Francisco Planning Department seeks to develop a list of qualified contractors to provide a variety of as-needed consulting services, with a focus on advancing equity and shared prosperity for all residents. The Planning Department is seeking to create four pools of qualified contractors ("Pool[s]"). Each Pool will have expertise in one (1) or more of the following areas: 1) Environmental (CEQA Services) 2) Transportation Review 3) Historical Resources 4) Archeology	June 27, 2022	June 28, 2028	REGULAR
<a href="#">46236 - 22/23</a>	MAYOR	\$2,500,000.00	The Mayor's Office of Housing and Community Development (MOHCD) is seeking to establish a pool of qualified consultants and financial advisors to advise the City on all pertinent issues relating to particular financings, to ensure that the City's transactions meet all applicable standards of competence and fiscal prudence, to structure and update existing programs, assist in advocacy and application for funds and other resources,	September 1, 2022	September 1, 2026	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			all while adhering to program requirements and affordable housing objectives. The consultants and financial advisors will; provide advisory services to competitive sales, negotiated sales, private placements, and management of housing assets and/or bond types (tax bond, revenue bonds, etc.), provide financial advisory services to structuring the City's affordable housing programs; provide advisory services for structuring of particularly complex development proposal; provide advisory services for commercial space financing and asset management in affordable housing; assist in applications for state and federal resources; provide policy expertise on structuring new programs and updating existing programs; and to provide advice on advocacy and regulatory changes to housing programs.			
<u>45050 - 22/23</u>	MUNICIPAL TRANSPORTATION AGENCY	\$500,000.00	<p>Project Management Activities:</p> <ul style="list-style-type: none"> <li>-coordinate activities with L3Harris tech to perform on-site maintenance, troubleshooting, etc.</li> <li>-ensure proper updates are communicated to San Francisco Municipal Transportation Agency (SFMTA) (issue, cause, resolution)</li> <li>-conduct ad-hoc meetings as necessary, take meeting notes, send out updates</li> <li>-track actions/issues list and provide updates when required</li> <li>-prepare quarterly invoice packages for SFMTA</li> <li>-assist in coordinating additional resources when required (Patriot, Conduent, additional L3Harris staff)</li> <li>-assist in RMA (Remote Network Management) coordination and ensure timely delivery of materials back to SFMTA</li> </ul>	October 17, 2022	October 17, 2024	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>Systems Engineering Activities:</p> <ul style="list-style-type: none"> <li>-Review of various network management systems in response to emails describing system events and notification of possible system problems.</li> <li>-Regular review of the tunnel system using Intermapper, the radio system using the remote network management and system center operations manager review of network devices using CiscoPrime, and review of Conduent servers using WhatsUpGold. Report any issues that have been discovered.</li> <li>-Correction of problems when a remote solution is possible - e.g. remote reboot of a base station the device, configuration reloads on a tunnel Lantronix module when it is reporting "no SNMP response"</li> <li>-Periodic review (via browser) Alarm Point Duplicator (APO) status, Duracomm control center, Netlocks, and power systems (rectifiers and inverters). Report any issues that have been discovered</li> <li>-Support for Harris personnel: primarily Brian Gonsalves, Robyn Ferguson, and Tom Brown</li> <li>-Support for SFMTA personnel: Roi Kingon and Jacky So</li> <li>-Support for Conduent - generally with respect to configuration changes to WhatsUpGold.</li> <li>-System configuration changes as required. Historically that has included system database changes (in the user access system, Maestro console layout configuration, managing user accounts and access as required.</li> </ul>			
<u>48236 - 22/23</u>	MUNICIPAL TRANSPORTATION AGENCY	\$500,000.00	Execute Central Subway unit/integration test and Market Street regression test for subway sign system changes related to Central Subway. Penta travels on-site for two weeks for two engineers to support test execution for both	November 1, 2022	October 31, 2024	REGULAR



<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>Market and Central Subway. Penta remote analysis of test results.</p> <p>Software development to address bug fixes and mitigation of issues with Thales Automated Train Control System data feed for Central Subway. Software installation and cut-over support for any required updates.</p> <p>Design and software development to support changes to transit service in Central Subway including new shuttle lines and enhanced passenger information at Chinatown station.</p>			
<a href="#">49342 - 22/23</a>	MUNICIPAL TRANSPORTATION AGENCY	\$3,000,000.00	<ol style="list-style-type: none"> <li>1. Intelligent Transportation Systems Project Support</li> <li>2. IT Network Infrastructure Support</li> <li>3. Data and Analytics Infrastructure Support</li> <li>4. SharePoint Administration and Migration Support</li> <li>5. Java / Middleware Engineer Support</li> <li>6. Salesforce Development and Administration Support</li> </ol> <p>(see attached attached description)</p>	November 1, 2022	October 31, 2026	REGULAR
<a href="#">42304 - 22/23</a>	PORT	\$7,500,000.00	<p>The Port requires the expertise of qualified consultants capable of providing environmental and related professional services on an as-needed basis. Requested services may involve an entire project, several projects, and part of a project or for any project phase. Consultants who are awarded contracts under this RFQ may be expected to work in conjunction with the Port's technical staff and/or other consultants hired by the Port as part of a project team.</p>	January 2, 2022	January 1, 2026	REGULAR
<a href="#">41620 - 22/23</a>	PUBLIC UTILITIES COMMISSION	\$30,000,000.00	<p>Work will consist of technical and project management services in all aspects required for expansion of an existing reservoir accomplished by raising a dam by over</p>	December 31, 2022	December 31, 2026	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>50 feet. The increased reservoir storage will provide regional storage to benefit to 8 Bay Area and Central Valley water agencies.</p> <p>Activities include planning, permitting and design work related to construction of a surface water dam and a 14 mile conveyance pipeline that will enable delivery of water to California State Water Project infrastructure at the California Aqueduct. Operational and hydraulic modeling, regulatory permitting, facility design for Los Vaqueros dam and Transfer Bethany Pipeline, natural resources services, project management services, asset management services, land acquisition and management services, security and emergency response services, environmental and regulatory compliance services. The SFPUC's Alternative Water supplies staff are involved in the planning of the project. SFPUC staff at the Water Enterprise work closely in collaboration with other agencies to provide, engineering, financial, and communication direction and support for the project. In addition, the SFPUC's Assistant General Manager for Water and General Manager serve on the JPA Board of Directors.</p>			
<u>42270 - 22/23</u>	PUBLIC UTILITIES COMMISSION	\$30,000,000.00	<p>The SFPUC requests to solicit the services of a consultant to provide and support ongoing emergency preparedness, response, and support activities to all SFPUC enterprises and divisions. Specifically: Incident Command System (ICS) training under the National Incident Management System (NIMS) to SFPUC employees, updates to Field Operations Guides (FOG's) and Emergency Operations Plans (EOP's), assistance with the creation of an emergency drinking water distribution plan (in conjunction with DEM and other city partners), and other related emergency planning and response services to the</p>	November 21, 2022	November 20, 2026	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			SFPUC as needed. Consultant would additionally coordinate any needed updates of existing Divisional EOPs into the general EOP as necessary; and ensure that comments, corrections and editing discussed in after action report/post exercise briefings are incorporated into the EOP, DEOP, and/or FOG, as necessary and/or as prescribed. Consultant would work with SFPUC Emergency Planning and Security (EPS) team to strategize on how to update complex EOP documents, targeted at producing specific checklists for actionable emergency response for operating divisions and front line staff. Consultant would also work with EPS Team to design, coordinate, and conduct multi-divisional emergency response exercises to build upon smaller division specific exercises already being delivered by EPS team.			
<u>42409 - 22/23</u>	PUBLIC UTILITIES COMMISSION	\$500,000.00	<p>Contractor will be required to assist the SFPUC with the application of the sodium carbonate peroxyhydrate and hydrogen dioxide in local source water reservoirs, including but not limited to Calaveras, San Antonio Reservoir, Crystal Springs, Pilarcitos and San Andreas Reservoirs.</p> <p>The Contractor is expected to provide all labor, technical advice, written pest control recommendations, watercraft, precision application inductor systems and GPS tracking equipment for the specified reservoir treatment at the application rate as specified by the SFPUC. The Contractor shall document the aquatic algaecide treatment through the use of GPS data collection equipment to record the path of the treatment boats across the treatment areas within the specified reservoir.</p> <p>Treatments, once started, shall be fully completed prior to</p>	January 1, 2023	December 31, 2027	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>the Contractor demobilizing from the site and shall be performed on a 24-hour per day, 7-day per week basis.</p> <p>In addition to the actual algaecide application, the services that shall accompany each treatment are as follows:</p> <p>All work performed by Contractor must conform to and comply with the requirements of all applicable permits, licenses and environmental mitigation requirements developed under the California Environmental Quality Act.</p> <p>A pre-treatment inspection shall be conducted by the Consultant, which shall include a survey of the reservoir to be treated to ensure an accurate assessment of the treatment area conditions. A post-treatment report shall be prepared by the Consultant and submitted to the SFPUC presenting a summary of the treatment within 15 working days following each treatment.</p> <p>This report shall contain a written description of the work performed, a listing of the licensed applicators and other staff who performed the work, equipment used and the treatment methodology.</p> <p>The post-treatment report shall also contain the GPS treatment data, in digital format, collected during the treatment. The treatment area shall be downloaded into ArcView 9.1 software and overlaid onto an existing aerial photo of the specified reservoir for documentation and regulatory reporting requirements.</p> <p>The SFPUC will provide the following:  The required amount of algaecide, any water discharge permit modifications and notifications required for application and any surface water quality monitoring</p>			

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			associated with the algaecide application that may be required by water discharge permits, if any.			
<a href="#">42602 - 22/23</a>	PUBLIC UTILITIES COMMISSION	\$15,000,000.00	The scope of work includes obtain services to augment and assist SFPUC staff with specialized program/ project scheduling, Critical Path Method (CPM) scheduling, forecasting, change control, cost controls, and cost estimating for capital improvement projects and programs, review construction change orders and evaluate cost and schedule impacts, database modifications, upload/download of data from other software systems to the Primavera suite of tools used in Program Controls Group (PCG), and other specialized services such as providing technical training to staff.	February 1, 2023	January 31, 2033	REGULAR
<a href="#">48374 - 22/23</a>	PUBLIC UTILITIES COMMISSION	\$750,000.00	The SFPUC seeks to select Proposers with proven expertise and extensive experience in the following areas: 1. Provide aerial surveying and patrol services to support the maintenance of the power transmission system; 2. Provide priority transportation services for emergency repairs of infrastructure not accessible during certain periods of the year; 3. Provide transportation to HHWP facilities in the event of unforeseen disasters or emergencies; provide training for Human External Cargo operations, and 4. Provide as-needed shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.	October 1, 2023	September 30, 2028	REGULAR
<a href="#">41517 - 22/23</a>	SHERIFF	\$120,000.00	The San Francisco Sheriff's Office propose to enter into a contract with Recology San Bruno for the garbage collection services for San Francisco County Jail #3 located in San Bruno, CA. Under the San Bruno Municipal Code 10.20.050, the City of San Bruno issued	October 1, 2022	September 30, 2023	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			an exclusive contract for the collection of garbage with Recology San Bruno.			
			<b>TOTAL AMOUNT \$108,820,000</b>			

# POSTING FOR

November 21, 2022

## PROPOSED PERSONAL SERVICES CONTRACTS – MODIFICATION

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
40888 - 16/17 - MODIFICATIONS	November 21, 2022	AIRPORT COMMISSION -- AIR	\$0	\$100,000,000	Project Management Support Services (PMSS) & Design Build (DB) teams will manage and complete the design and construction of the Energy Management Control System (EMCS) program at the San Francisco International Airport (Airport). The EMCS is a system comprised of hardware and software that manages and controls a building's use of energy for heating, ventilation, air conditioning, water, gas, and electricity. The EMCS will replace the multiple systems currently used by stationary engineers with 1 centralized system. The EMCS will comply with American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) 36 guidelines, the most recent industry-standard nationally-recognized uniform standards for heating, ventilating, and air-conditioning systems, ( <a href="http://gpc36.savemyenergy.com/download/360/">http://gpc36.savemyenergy.com/download/360/</a> ) to connect all buildings, provide campus-level management and control, and transfer data to Information Technology and Telecommunications (ITT). This project includes creating the building management system for both terminal and non-terminal buildings from multiple segmented systems to 1 connected system to track energy and utilities	06/01/2023	12/31/2025	REGULAR

PSC Number	<u>Commis sion Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					information. Services include project controls, scheduling, document controls, design management, contracts management, architectural and engineering design services, construction, and special systems integration services. All work will be supervised by the project manager. A staffing plan will be developed and Stationary Engineers will maintain the EMCS equipment and system. Of the amount requested, construction costs will account for an estimated \$80,000,000.			
31087 - 21/22 - MODIFICATIONS	November 21, 2022	ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN	\$250,000	\$350,000	OEWD seeks a qualified consultant (or team of consultants) to support an economic impact analysis, to inform the City's economic recovery efforts with respect to the COVID-19 pandemic. The goals of the analysis include: - To determine changes to the economic make up of San Francisco's office core as a result of COVID-19 and how changes to employee commuting patterns will impact the viability and the space requirements of downtown offices and office-serving small businesses - To assess San Francisco office core's competitiveness relative to other comparable markets within the State and nationally - To identify the policies, programs, resources, and interventions required to maximize new entrants to the San Francisco office market as well as the adaptation and long-term robustness of San Francisco offices operating in the post-COVID economic context, and - To identify the activities, uses, and incentives that will increase the motivation for employees and	07/01/2023	06/30/2024	REGULAR



PSC Number	<u>Commiss ion Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
36826 - 18/19 - MODIFICATIONS	November 21, 2022	ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN	\$100,000	\$200,000	<p>other stakeholders to choose to work and/or visit the downtown office core The scope of this contract (or contracts) will include research tasks (surveys, interviews, stakeholder engagement) as well as impact analysis tasks, described below.</p> <p>The Office of Economic and Workforce Development (OEWD) would like to contract with a consultant to provide project management, research, writing, and editing support to produce its mandated Local Workforce Development Plan Update mandated by the California Employment Development Department. Local Workforce Development Areas that administer Department of Labor (DOL) workforce dollars are required by Federal Workforce Innovation and Opportunity Act (WIOA) legislation to submit a Local Plan to the State Workforce Development Board (SWDB) every 4 years. The Plan describes the Local Area's workforce delivery principles and strategies for the subsequent years. The State Workforce Development Board issued directive WSD18-01 on July 27, 2018 requiring Local Workforce Development Boards to submit biennial updates, with the next due in March 2019. While the focus of this contract will be on the Local Plan, additional consulting needs related to WIOA-related DOL and SWDB directives issued within the contract term may be identified and negotiated as part of this contract. Specifically, OEWD wishes to engage a consultant with expert-level knowledge of WIOA to ensure full compliance with all</p>	01/01/ 2023	12/31/ 2026	REGULAR

PSC Number	<u>Commis sion Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					legal and technical requirements for subsequent revisions and updates to the Local Plan. Currently, it is expected that the work completed through this contract will enable the Department to manage biennial updates to the plan after the March 2021 plan is due, but the Department requests an additional 6 months of authority to transition this work (through September 2021) in the event that the Department of Labor requests clarification or resubmission of any documentation.			
49873 - 18/19 - MODIFICATIONS	November 21, 2022	ECONOMIC AND WORKFORCE DEVELOPME T -- ECN	\$500,000	\$950,000	The Office of Economic and Workforce Development ("OEWD") seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming. Activities may include the following: Workforce Development and Design: Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed. Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning	07/01/ 2023	06/30/ 2027	REGULAR

PSC Number	<u>Commis sion Hearing Date</u>	Department	Additiona l Amount	Cumulati ve Total	Description	Start Date	End Date	Approval Type
					<p>assessments, apprenticeship, learning labs and learning networks, and innovation process strategies. Training and Technical Assistance on Regulatory Compliance: Providing technical assistance and training to service providers on administrative compliance with the State and Federal fund sources with an emphasis on Workforce Innovation and Opportunity Act (WIOA) funds and appropriate activities. Training of Best Practices in Workforce Development: Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas: Client customer service - motivational interviews and strength-based interviews; effective case management to enhance participant success; competency based assessments; retention best practices; strategies for effective job development and employer engagement; strategies to utilize external resources outside of workforce system to support clients; using Labor Market Information (LMI) to best inform programming; common measures to identifying "job readiness" across workforce system; innovation in incentivizing participants to submit required documentation (i.e. employment/education verification); employment matching based on skills, interests and sustainable wage occupations; and strategies for removing employment barriers.</p>			

PSC Number	<u>Commiss</u> <u>ion</u> <u>Hearing</u> <u>Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
46770 - 19/20 - MODIFICATIONS	November 21, 2022	HUMAN SERVICES -- DSS	\$150,000	\$348,000	Assist CalWORKs to complete the components of Cal-OAR (CalWORKs Outcome and Accountability Review), a State of California mandated project. Proposed works are as follow: (1) review of the current system and, (2) development of a system improvement plan.	08/30/2022	06/30/2025	REGULAR
4123 12/13 - MODIFICATIONS	November 21, 2022	PUBLIC HEALTH -- DPH	\$2,421,692	\$6,969,752	Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.	10/01/2019	06/30/2029	REGULAR
45965 - 19/20 - MODIFICATIONS	November 21, 2022	PUBLIC UTILITIES COMMISSION -- PUC	\$375,000	\$750,000	Crane inspections and repair in accordance with CalOSHA ANSI standards in compliance with Plate V title 8 Federal code including OSHA 1810.179, ASME, and ANSI. Scope of services will include, but is not limited to the following main services on equipment located within SFPUC-WWE system wide: • Quarterly Maintenance and Inspections • Mandatory Partial Load Testing, • Proof Load and Operational Testing, • Mandatory Annual Inspection, Maintenance, Certification • Quadrennial Inspection, Maintenance, Certification, • Troubleshooting and • “As-needed Repairs”	09/30/2022	01/31/2026	REGULAR
<b>TOTAL AMOUNT \$3,796,692</b>								

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Explosive Detection Canine Training

Funding Source: Airport Operating Funds

PSC Amount: \$200,000

PSC Est. Start Date: 01/01/2023

PSC Est. End Date  
06/30/2026

**1. Description of Work**

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

The San Francisco International Airport (Airport) requires a contractor to provide as-needed and intermittent training to the San Francisco Police Department - Airport Bureau (SFPD-AB) police service canines (K-9) and their handlers on explosives detection in accordance with the latest Transportation Security Administration (TSA) standards and important alert notices.

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

TSA requires annual certification for explosive detection of each of the SFPD-AB K-9 teams to ensure continual operational proficiency in the working environment. Denial of services may impact the K-9 teams understanding of the TSA's stringent standards and the preparation needed for the annual certification review.

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 previously been provided under PSC# 49336-18/19.

D. Will the contract(s) be renewed?

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

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

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).

B. Explain the qualifying circumstances:

The TSA explosive detection canine trainings are on an as-needed and intermittent basis to prepare K-9 unit teams for annual certification.

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

- A. Specify required skills and/or expertise: The contractor must have expertise in training police service canines in explosives detection and must have experience with TSA standards as it relates to training K-9 teams working in an airport environment.
- B. Which, if any, civil service class(es) normally perform(s) this work? Q002, Police Officer; Q003, Police Officer 2; Q004, Police Officer 3; Q050, Sergeant, (Police Department); Q051, Sergeant 2; Q052, Sergeant 3;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

None. The City has police officers who handle K-9, but no officers that provide training per TSA standards.

**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 classifications for staff to provide explosives detection training for K-9 teams in concurrence with TSA standards.
- 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 expertise and experience required for the training services are on an as-needed and intermittent basis.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
Yes. The contractor will provide an average 20-25 hours of field assessment, training and exercise for each team (handler and K-9) to conform to the TSA certification standards on explosive detection. At this time, the SFPD-AB anticipates that three (3) Q050 Sergeants and 13 Q004 Police Officers and their K-9s will be trained by the contractor.
- 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 09/21/2022, the Department notified the following employee organizations of this PSC/RFP request:  
SFPOA - Q2-Q50

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41818 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022



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

## Quoc Truong (AIR)

---

**From:** dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfso.com  
**Sent:** Wednesday, September 21, 2022 4:13 PM  
**To:** Cynthia Avakian (AIR); mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; Quoc Truong (AIR); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 41818 - 22/23

RECEIPT for Union Notification for PSC 41818 - 22/23 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 41818 - 22/23 for \$200,000 for Initial Request services for the period 01/01/2023 – 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/19185> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Transportation Security Administration Explosive Detection Canine Training

Funding Source: Airport Operating Funds

PSC Amount: \$260,000

PSC Est. Start Date: 11/05/2018

PSC Est. End Date 06/30/2023

## 1. Description of Work

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

The contractor will provide training to the San Francisco Police Department – Airport Bureau (SFPD-AB) police service canines (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards.

Department of Homeland Security - Transportation Security Administration (TSA) required

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

TSA requires annual certification for explosives detection of each of the SFPD-AB K-9 unit teams. This training will ensure the K-9 unit teams are prepared and more successful during TSA's certification reviews. Not providing this training will result in increased failure rates of the K-9 unit teams, which jeopardizes security at SFO. It would further require SFO to bring in new K-9 units to the program at an increased cost, rather than proactively working with the existing K-9's by providing training.

### 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 service.

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

Yes, if there continues to be need for this service at SFO.

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

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).

B. Explain the qualifying circumstances:

The work is required on an as-needed intermittent basis.

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

A. Specify required skills and/or expertise: The contractor must have expertise in training police service K-9's in explosives detection, and must have experience with TSA standards as it relates to training K-9 units working in an Airport environment.

B. Which, if any, civil service class(es) normally perform(s) this work? Q002, Police Officer; Q003, Police Officer 2; Q004, Police Officer 3; Q050, Sergeant, (Police Department); Q051, Sergeant 2; Q052, Sergeant 3;

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

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

None. The City has police officers who handle K-9 units, but not who provide training per TSA standards.

**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 classifications for staff to provide explosives detection training for K-9 unit teams in concurrence with TSA standards.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, as the training will happen on an intermittent basis and does not justify creating a new civil service classification.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Yes. Yes, the contractor will provide 17 hrs of field assessment, training and exercise for each team (handler and K-9) to conform to the TSA certification standards on explosive detection. Two (2) Q50 sergeants and 13-18 Q4 Police Officers and their K9s will be trained by the contractor.

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 09/10/2018, the Department notified the following employee organizations of this PSC/RFP request:  
SFPOA - Q2-Q50

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49336 - 18/19

DHR Analysis/Recommendation:

action date: 11/19/2018

Commission Approval Required

Approved by Civil Service Commission

11/19/2018 DHR Approved for 11/19/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: International Marketing Services in Overseas Locations

Funding Source: Airport Operating Funds

PSC Amount: \$7,500,000

PSC Est. Start Date: 01/01/2023

PSC Est. End Date  
12/31/2027

**1. Description of Work**

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

The San Francisco International Airport ("SFO" or "Airport") requires international marketing consultants to perform services in overseas locations to increase international flight activity and to support the current airline service providers at SFO. Consultants will develop and execute marketing programs, promote SFO's new flights, provide market research support based on their respective region, strategic planning and execution of campaigns for SFO with airlines and industry partners to attract new and retain airlines at SFO. These services also include securing and arranging new partnerships with airlines and/or travel trade partners to promote new and existing air service to SFO in the following regions: Asia, Europe, Latin America, and Oceania. Consultants will provide a staff representative in the international marketing industry in each of these regions.

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

This service is necessary to protect and maintain the current level of SFO's international flights from future reductions in the highly competitive and volatile aviation industry. In addition, this service is required to continue future expansion of international flights in growing markets. Other United States airports are aggressively building networks of contacts and relationships in similar markets and the absence of SFO in these current and future potential markets puts SFO at risk of losing international service providers. Denial of these services may lead to a loss of international flight activity and revenue to SFO.

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 most recently been provided under PSC#49266-17/18.

D. Will the contract(s) be renewed?

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

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

This PSC is requested for a term of five years to match the contract that the Airport seeks to enter into.

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

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

- 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:

Projects issued are short-term and on an as-needed basis as they are dependent on the need and current market conditions and trends within that region. Expertise and experience in public and foreign relations, tourism and trade show marketing, international marketing and advertising are required, within the following regions: Asia, Europe, Latin America, and Oceania. Consultants will provide a staff representative in the international marketing industry in each of these regions.

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

- A. Specify required skills and/or expertise: Expertise and experience in public and foreign relations, tourism and trade show marketing, international marketing and advertising, and familiarity with international market trends and conditions in the following regions: Asia, Europe, Latin America, and Oceania. All marketing and information generated overseas must be provided in the country's local language.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1310, Public Relations Assistant; 1802, Research Assistant; 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5320, Illustrator and Art Designer; 5322, Graphic Artist; 5330, Graphics Supervisor; 9251, Public Relations Mgr; 0931, Manager III; 0933, Manager V; 9252, Communications Specialist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide representation offices in various overseas regions including Asia, Europe, Oceania and Latin America.

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

No efforts have been made, since the work will need to be performed in overseas locations.

**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 not applicable because those performing the work must be familiar with international markets trends and conditions and the work must be performed in overseas locations by these individuals.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, as the work must be performed in overseas locations and requires knowledge of local tourism, current market trends, and aviation needs within that region.

**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 08/23/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Municipal Executive Association; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47770 - 22/23

DHR Analysis/Recommendation:  
Commission Approval Required  
DHR Approved for 11/21/2022

Civil Service Commission Action:

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [cynthia.avakian@flysfso.com](mailto:cynthia.avakian@flysfso.com)  
**To:** [Cynthia Avakian \(AIR\)](mailto:Cynthia.Avakian@AIR); [Jason Klumb](mailto:Jason.Klumb); [Frigault, Noah \(HRC\)](mailto:Frigault.Noah@HRC); [Mevers, Julie \(HSA\)](mailto:Mevers.Julie@HSA); [Thomas Vitale](mailto:Thomas.Vitale); [Ricardo.lopez@sfgov.org](mailto:Ricardo.Lopez@sfgov.org); [Basconcillo, Katherine \(PUC\)](mailto:Basconcillo.Katherine@PUC); [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net); [wendy.frigillana@seiu1021.org](mailto:wendy.frigillana@seiu1021.org); [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org); [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org); [Poon, Sin Yee \(HSA\)](mailto:Poon.Sin.Yee@HSA); [david.canham@seiu1021.org](mailto:david.canham@seiu1021.org); [jtanner940@aol.com](mailto:jtanner940@aol.com); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Laxamana, Junko \(DBI\)](mailto:Laxamana.Junko@DBI); [Criss@sfmea.com](mailto:Criss@sfmea.com); [camaguey@sfmea.com](mailto:camaguey@sfmea.com) (contact); [christina@sfmea.com](mailto:christina@sfmea.com); [staff@sfmea.com](mailto:staff@sfmea.com); [Janelle Dung-Sapantay \(AIR\)](mailto:Janelle.Dung-Sapantay@AIR); [DHR-PSCCoordinator](mailto:DHR-PSCCoordinator), [DHR \(HRD\)](mailto:DHR@HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 47770 - 22/23  
**Date:** Tuesday, August 23, 2022 5:24:34 PM

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RECEIPT for Union Notification for PSC 47770 - 22/23 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 47770 - 22/23 for \$7,500,000 for Initial Request services for the period 01/01/2023 – 12/31/2027. 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/18912> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR Dept. Code: AIR

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

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

Type of Service: International Marketing Services in Overseas Locations

Funding Source: Airport Operating Funds PSC Duration: 7 years 4 weeks
PSC Amount: \$13,000,000 PSC Est. Start Date: 12/01/2017 PSC Est. End Date: 12/31/2024

1. Description of Work

A. Scope of Work:

San Francisco International Airport (SFO) requires the services of International Marketing consultants to perform services in overseas locations to increase international flight activity to SFO. These international services will include: strategic planning and marketing, air service development support, market research, public relations, cultural consultation and branding.

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

This service is necessary to keep SFO competitive in a highly volatile aviation industry. The consultant would work to maintain SFO's current international service or increase flights to new destinations with new airlines. Other U.S. and North American airports are aggressively building networks of contacts and relationships in similar markets and an absence of SFO in these current and future potential markets puts the Airport at risk of losing international service. Denial of these services will most likely lead to a loss of projected international flight activity and revenue.

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. This service have been provided most recently under PSC No. 4130-08/09.

D. Will the contract(s) be renewed? Yes, if there continues to be a need for such services at SFO.

2. Union Notification: On 08/25/2017, the Department notified the following employee organizations of this PSC/RFP request: Municipal Executive Association; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellan

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49266 - 17/18

DHR Analysis/Recommendation:

11/20/2017

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 11/20/2017

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

A. Specify required skills and/or expertise:

Expertise and experience in providing: public and foreign relations; tourism and trade show marketing/representation; and international marketing/international advertising and distribution development. All marketing generated overseas must be provided in the local language of the target destinations. Ability to provide the required expertise in the target overseas locations.

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

0932,0922,1840,1823,1842,1802,

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

Yes. The contractor will provide representation offices in various overseas locations including but not limited to the regions of Asia, Europe, Latin America and Oceania.

**4. Why Classified Civil Service Cannot Perform**

A. Explain why civil service classes are not applicable:

Civil service classes are not applicable as the work will be performed in overseas locations.

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

None, as the work will be performed in overseas locations.

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

**YES NO**

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 10/25/2017 BY:

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

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ASSESSOR / RECORDER -- ASR

Dept. Code: ASR

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

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

Type of Service: Digital Reel system upgrade and document review to implement AB1466

Funding Source: ASR department budget (Recorder fund)

PSC Duration: 6 years 1 day

PSC Amount: \$500,000

**1. Description of Work**

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

The Office of the Assessor-Recorder (ASR) has an existing contract with BMI Imaging Systems Inc. (BMI) to host approximately 15.1 million pages of documents that were recorded between 1906 and 1999. BMI's proprietary platform Digital Reel is the portal through which members of the public can view and request copies of these archived records.

In 2021, the California Legislature approved Assembly Bill 1466 (AB1466) which requires all California Counties to redact from deeds and other property documents any language that is discriminatory or racially restrictive. To achieve this legislated mandate, ASR would like to enter into a new professional services contract with BMI to upgrade the existing software, enable search capability for this restrictive language, and subsequently redact inappropriate content. The estimated contract value is \$280,000 but may increase up to \$500,000 during contract negotiations; the initial contract term is four (4) years with two (2) one-year options to extend for one year each.

As part of this software upgrade, historical records will be searched using optical character recognition (OCR) technology to identify unlawfully Restrictive Covenants. Once identified, BMI will perform a manual review of each suspected Restricted Covenant for accuracy, and will manually data enter key document details and page locations within the recorded document where terms were found. Once identified, BMI will route the documents through a secure AB-1466 website which can be accessed by both ASR and the City Attorney for further processing. The City Attorney's Office will review and approve the proposed changes in the software, and ASR will re-record the original document with the illegal language redacted. Furthermore, this system upgrade would allow ASR to meet the reporting requirement which his required by the legislation.

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

This work is required under Assembly Bill 1466 and requires all California Counties to redact from deeds and other property documents any language that is discriminatory or racially restrictive. This contract will help ASR meet the timeline set forth in its AB 1466 Implementation Plan (<http://www.sfassessor.org/forms-notice/forms/restrictive-covenant-modification-program-implementation-plan>). If denied, this work will be delayed and the department will not be able to meet the requirements of this new law.

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 particular service has not been provided in the past. However, BMI's existing contract for software and records hosting used the Office of Contract Administration's (OCA) continuing Civil Service approval for proprietary software support, cloud-based applications, and equipment installation and maintenance.

D. Will the contract(s) be renewed?

The initial contract term will be four (4) years with two (2) one-year options to extend for one (1) year each. ASR does not anticipate that this contract will require renewal after that full six (6) year term.

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 will have an initial term of 4 years, with two 1 year options to extend for 1 year each. This is important flexibility for ASR in case additional restrictive keywords must be searched and redacted or the volume of documents identified for redaction is greater than anticipated.

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

B. Explain the qualifying circumstances:

BMI will upgrade their proprietary software, which is work that City personnel cannot complete. In addition, for the document review scope, ASR does not have staffing resources to complete the extensive document review and indexing work required by AB1466. This effort has a short-term duration and limited scope of documents for review, so it is not feasible or practical for ASR to staff up to handle this document review.

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

A. Specify required skills and/or expertise: Ability to perform work on BMI's proprietary Digital Reel system. Ability to review documents for racially restrictive language and index document fields.

B. Which, if any, civil service class(es) normally perform(s) this work? 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 4213, ASR-Office Assistant; 4214, Assessor-Recorder Office Spec; 4215, ASR Senior Office 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?**

For the technical system upgrade work, ASR cannot perform work on BMI's proprietary Digital Reel system. For the document review scope, ASR does not have staffing resources to complete the extensive



document review and indexing work required by AB1466.

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

A. Explain why civil service classes are not applicable.

For the technical system upgrade work, ASR cannot perform work on BMI's proprietary Digital Reel system. For the document review scope, ASR does not have staffing resources to complete the extensive document review and indexing work required by AB1466.

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. For the technical system upgrade work, ASR cannot perform work on BMI's proprietary Digital Reel system. For the document review scope, ASR does not have staffing resources to complete the extensive document review and indexing work required by AB1466.

**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. In partnership with ASR staff, the contractor may train employees on how to use the new parts of the BMI Digital Reel system for restrictive covenant review, indexing, and rerecording under AB1466. A number of training hours cannot be determined at this time. This training would impact staff in the 421X series in ASR's Recorder and Public Service divisions. No training will be performed on the system upgrade scope of this contract.

C. Are there legal mandates requiring the use of contractual services?

Yes. California Government Code Section 12956.3 notes that County Recorders must identify and redact restrictive covenants. San Francisco County's records are hosted in BMI's Digital Reel system for records prior to 2000.

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. The Office of the Assessor-Recorder (ASR) has an existing contract with BMI Imaging Systems Inc. (BMI) to host approximately 15.1 million pages of documents that were recorded between 1906 and 1999. BMI's proprietary platform Digital Reel is the portal through which members of the public can view and request copies of these archived records.

**7. Union Notification:** On 08/25/2022, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Management & Superv Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP; SEIU 1021 Miscellaneous; SEIU Local 1021; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); SEIU, Local 1021 H-1 Fire-Rescue Paramedics

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

Name: Molly Peterson Phone: 415-554-4734 Email: molly.peterson@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, City Hall Room 190 San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40013 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

**From:** [dhrr-psccordinator@sfgov.org](mailto:dhrr-psccordinator@sfgov.org) on behalf of [molly.peterson@sfgov.org](mailto:molly.peterson@sfgov.org)  
**To:** [Peterson, Molly \(ASR\)](mailto:Peterson.Molly@ASR); [snaranjo@cirseiu.org](mailto:snaranjo@cirseiu.org); [jennifer.esteen@seiu1021.org](mailto:jennifer.esteen@seiu1021.org); [emathurin@cirseiu.org](mailto:emathurin@cirseiu.org); [abush@cirseiu.org](mailto:abush@cirseiu.org); [sbabaria@cirseiu.org](mailto:sbabaria@cirseiu.org); [kcartermartinez@cirseiu.org](mailto:kcartermartinez@cirseiu.org); [ablood@cirseiu.org](mailto:ablood@cirseiu.org); [max.porter@seiu1021.org](mailto:max.porter@seiu1021.org); [sarah.wilson@seiu1021.org](mailto:sarah.wilson@seiu1021.org); [Sandeep.lal@seiu1021.me](mailto:Sandeep.lal@seiu1021.me); [leah.berlanga@seiu1021.org](mailto:leah.berlanga@seiu1021.org); [Jason Klumb](mailto:Jason.Klumb); [Frigault, Noah \(HRC\)](mailto:Frigault.Noah@HRC); [Mevers, Julie \(HSA\)](mailto:Mevers.Julie@HSA); [Thomas Vitale](mailto:Thomas.Vitale); [Ricardo.lopez@sfgov.org](mailto:Ricardo.lopez@sfgov.org); [Basconcillo, Katherine \(PUC\)](mailto:Basconcillo.Katherine@PUC); [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net); [wendy.frigillana@seiu1021.org](mailto:wendy.frigillana@seiu1021.org); [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org); [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org); [Poon, Sin Yee \(HSA\)](mailto:Poon.Sin.Yee@HSA); [david.canham@seiu1021.org](mailto:david.canham@seiu1021.org); [jtanner940@aol.com](mailto:jtanner940@aol.com); [Laxamana, Junko \(DBI\)](mailto:Laxamana.Junko@DBI); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [kpage@ifpte21.org](mailto:kpage@ifpte21.org); [eerbach@ifpte21.org](mailto:eerbach@ifpte21.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Peterson, Molly \(ASR\)](mailto:Peterson.Molly@ASR); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator,DHR@HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 40013 - 22/23  
**Date:** Thursday, August 25, 2022 1:25:00 PM

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RECEIPT for Union Notification for PSC 40013 - 22/23 more than \$100k

The ASSESSOR / RECORDER -- ASR has submitted a request for a Personal Services Contract (PSC) 40013 - 22/23 for \$500,000 for Initial Request services for the period 01/01/2023 – 12/31/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/19067> 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)**


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**GOVERNMENT CODE - GOV**

**TITLE 2. GOVERNMENT OF THE STATE OF CALIFORNIA [8000 - 22980]** ( Title 2 enacted by Stats. 1943, Ch. 134. )

**DIVISION 3. EXECUTIVE DEPARTMENT [11000 - 15986]** ( Division 3 added by Stats. 1945, Ch. 111. )

**PART 2.8. CIVIL RIGHTS DEPARTMENT [12900 - 12999]** ( Heading of Part 2.8 amended by Stats. 2022, Ch. 48, Sec. 29. )

**CHAPTER 6. Discrimination Prohibited [12940 - 12957]** ( Chapter 6 added by Stats. 1980, Ch. 992. )

**ARTICLE 2. Housing Discrimination [12955 - 12957]** ( Article 2 added by Stats. 1980, Ch. 992. )

**12955.** It shall be unlawful:

(a) For the owner of any housing accommodation to discriminate against or harass any person because of the race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information of that person.

(b) For the owner of any housing accommodation to make or to cause to be made any written or oral inquiry concerning the race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, disability, veteran or military status, or genetic information of any person seeking to purchase, rent, or lease any housing accommodation.

(c) For any person to make, print, or publish, or cause to be made, printed, or published any notice, statement, or advertisement, with respect to the sale or rental of a housing accommodation that indicates any preference, limitation, or discrimination based on race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information or an intention to make that preference, limitation, or discrimination.

(d) For any person subject to the provisions of Section 51 of the Civil Code, as that section applies to housing accommodations, to discriminate against any person on the basis of sex, gender, gender identity, gender expression, sexual orientation, color, race, religion, ancestry, national origin, familial status, marital status, disability, genetic information, source of income, veteran or military status, or on any other basis prohibited by that section. Selection preferences based on age, imposed in connection with a federally approved housing program, do not constitute age discrimination in housing.

(e) For any person, bank, mortgage company, or other financial institution that provides financial assistance for the purchase, refinance, organization, or construction of any housing accommodation to discriminate against any person or group of persons because of the race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information in the terms, conditions, or privileges relating to the obtaining or use of that financial assistance.

(f) For any owner of housing accommodations to harass, evict, or otherwise discriminate against any person in the sale or rental of housing accommodations when the owner's dominant purpose is retaliation against a person who has opposed practices unlawful under this section, informed law enforcement agencies of practices believed unlawful under this section, has testified or assisted in any proceeding under this part, or has aided or encouraged a person to exercise or enjoy the rights secured by this part. Nothing herein is intended to cause or permit the delay of an unlawful detainer action.

(g) For any person to aid, abet, incite, compel, or coerce the doing of any of the acts or practices declared unlawful in this section, or to attempt to do so.

(h) For any person, for profit, to induce any person to sell or rent any dwelling by representations regarding the entry or prospective entry into the neighborhood of a person or persons of a particular race, color, religion, sex,

gender, gender identity, gender expression, sexual orientation, marital status, ancestry, disability, genetic information, source of income, familial status, veteran or military status, or national origin.

(i) (1) For any person or other organization or entity whose business involves real estate-related transactions to discriminate against any person in making available a transaction, or in the terms and conditions of a transaction, because of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, source of income, familial status, disability, veteran or military status, or genetic information.

(2) For any person or other entity whose business includes performing appraisals, as defined in subdivision (b) of Section 11302 of the Business and Professions Code, of residential real property to discriminate against any person in making available those services, or in the performance of those services, because of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, source of income, disability, genetic information, veteran or military status, or national origin.

(j) To deny a person access to, or membership or participation in, a multiple listing service, real estate brokerage organization, or other service because of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, ancestry, disability, genetic information, familial status, source of income, veteran or military status, or national origin.

(k) To otherwise make unavailable or deny a dwelling based on discrimination because of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, source of income, disability, genetic information, veteran or military status, or national origin.

(l) To discriminate through public or private land use practices, decisions, and authorizations because of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, marital status, disability, genetic information, national origin, source of income, veteran or military status, or ancestry. Discrimination includes, but is not limited to, restrictive covenants, zoning laws, denials of use permits, and other actions authorized under the Planning and Zoning Law (Title 7 (commencing with Section 65000)), that make housing opportunities unavailable.

Discrimination under this subdivision also includes the existence of a restrictive covenant, regardless of whether accompanied by a statement that the restrictive covenant is repealed or void.

(m) As used in this section, "race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information," includes a perception that the person has any of those characteristics or that the person is associated with a person who has, or is perceived to have, any of those characteristics.

(n) To use a financial or income standard in the rental of housing that fails to account for the aggregate income of persons residing together or proposing to reside together on the same basis as the aggregate income of married persons residing together or proposing to reside together.

(o) In instances where there is a government rent subsidy, to use a financial or income standard in assessing eligibility for the rental of housing that is not based on the portion of the rent to be paid by the tenant.

(p) (1) For the purposes of this section, "source of income" means lawful, verifiable income paid directly to a tenant, or to a representative of a tenant, or paid to a housing owner or landlord on behalf of a tenant, including federal, state, or local public assistance, and federal, state, or local housing subsidies, including, but not limited to, federal housing assistance vouchers issued under Section 8 of the United States Housing Act of 1937 (42 U.S.C. Sec. 1437f). "Source of income" includes a federal Department of Housing and Urban Development Veterans Affairs Supportive Housing voucher. For the purposes of this section, a housing owner or landlord is not considered a representative of a tenant unless the source of income is a federal Department of Housing and Urban Development Veterans Affairs Supportive Housing voucher.

(2) For the purposes of this section, it shall not constitute discrimination based on source of income to make a written or oral inquiry concerning the level or source of income.

*(Amended by Stats. 2021, Ch. 352, Sec. 7. (AB 948) Effective January 1, 2022.)*

**12955.1.** (a) For purposes of Section 12955, "discrimination" includes, but is not limited to, a failure to design and construct a covered multifamily dwelling in a manner that allows access to, and use by, disabled persons by providing, at a minimum, the following features:

(1) All covered multifamily dwellings shall have at least one building entrance on an accessible route, unless it is impracticable to do so because of the terrain or unusual characteristics of the site. The burden of establishing

impracticability because of terrain or unusual site characteristics is on the person or persons who designed or constructed the housing facility.

(2) All covered multifamily dwellings with a building entrance on an accessible route shall be designed and constructed in a manner that complies with all of the following:

(A) The public and common areas are readily accessible to and usable by persons with disabilities.

(B) All the doors designed to allow passage into and within all premises are sufficiently wide to allow passage by persons in wheelchairs.

(C) All premises within covered multifamily dwelling units contain the following features of adaptable design:

(i) An accessible route into and through the covered dwelling unit.

(ii) Light switches, electrical outlets, thermostats, and other environmental controls in accessible locations.

(iii) Reinforcements in bathroom walls to allow later installation of grab bars around the toilet, tub, shower stall, and shower seat, where those facilities are provided.

(iv) Useable kitchens and bathrooms so that an individual in a wheelchair can maneuver about the space.

(b) (1) For purposes of Section 12955, "discrimination" includes, but is not limited to, a failure to design and construct 10 percent of the multistory dwelling units in buildings without an elevator that consist of at least four condominium dwelling units or at least three rental apartment dwelling units in a manner that incorporates an accessible route to the primary entry level entrance and that meets the requirements of paragraph (2) of subdivision (a) with respect to the ground floor, at least one bathroom on the primary entry level and the public and common areas. Any fraction thereof shall be rounded up to the next whole number. For purposes of this subdivision, "elevator" does not include an elevator that serves only the first ground floor or any nonresidential area. In multistory dwelling units in these buildings without elevators, the "primary entry level entrance" means the principal entrance through which most people enter the dwelling unit, as designated by the California Building Standards Code or, if not designated by California Building Standards Code, by the building official. To determine the total number of multistory dwelling units subject to this subdivision, all multistory dwelling units in the buildings subject to this subdivision on a site shall be considered collectively. This subdivision shall not be construed to require an elevator within an individual multistory dwelling unit or within a building subject to this subdivision. This subdivision shall apply only to multistory dwelling units in a building subject to this subdivision for which an application for a construction permit is submitted on or after July 1, 2005.

(2) Notwithstanding subdivision (c), the Division of the State Architect and the Department of Housing and Community Development may adopt regulations to clarify, interpret, or implement this subdivision, if either of them deem it necessary and appropriate.

(c) Notwithstanding Section 12935, regulations adopting building standards necessary to implement, interpret, or make specific the provisions of this section shall be developed by the Division of the State Architect for public housing and by the Department of Housing and Community Development for all other residential occupancies, and shall be adopted pursuant to Chapter 4 (commencing with Section 18935) of Part 2.5 of the Health and Safety Code. Prior to the effective date of regulations adopted pursuant to this subdivision, existing federal accessibility standards that provide, to persons with disabilities, greater protections than existing state accessibility regulations shall apply. After regulations pursuant to this subdivision become effective, particular state regulations shall apply if they provide, to persons with disabilities, the same protections as, or greater protections than, the federal standards. If particular federal regulations provide greater protections than state regulations, then those federal standards shall apply. If the United States Department of Housing and Urban Development determines that any portion of the state regulations are not equivalent to the federal standards, the federal standards shall, as to those portions, apply to the design and construction of covered multifamily dwellings until the state regulations are brought into compliance with the federal standards. The appropriate state agency shall provide notice pursuant to the Administrative Procedure Act (Chapter 5 (commencing with Section 11500) of Part 5 of Division 3 of Title 2) of that determination.

(d) In investigating discrimination complaints, the department shall apply the building standards contained in the California Building Standards Code to determine whether a covered multifamily dwelling is designed and constructed for access to and use by disabled persons in accordance with this section.

(e) The building standard requirements for persons with disabilities imposed by this section shall meet or exceed the requirements under the federal Fair Housing Amendments Act of 1988 (P.L. 100-430) and its implementing



regulations (24 C.F.R. 100.1 et seq.) and the existing state law building standards contained in the California Building Standards Code.

*(Amended by Stats. 2003, Ch. 642, Sec. 1. Effective January 1, 2004.)*

**12955.1.1.** For purposes of Section 12955.1, the following definitions shall apply:

(a) "Covered multifamily dwellings" means both of the following:

(1) Buildings that consist of at least four condominium dwelling units or at least three rental apartment dwelling units if the buildings have at least one elevator. For purposes of this definition, dwelling units within a single structure separated by firewalls do not constitute separate buildings.

(2) The ground floor dwelling units in buildings that consist of at least four condominium dwelling units or at least three rental apartment dwelling units if the buildings do not have an elevator. For purposes of this definition, dwelling units within a single structure separated by firewalls do not constitute separate buildings.

(b) "Multistory dwelling unit" means a condominium dwelling unit or rental apartment with finished living space on one floor and the floor immediately above or below it or, if applicable, the floors immediately above and below it.

*(Added by Stats. 2003, Ch. 642, Sec. 2. Effective January 1, 2004.)*

**12955.2.** For purposes of this part, "familial status" means one or more individuals under 18 years of age who reside with a parent, another person with care and legal custody of that individual, a person who has been given care and custody of that individual by a state or local governmental agency that is responsible for the welfare of children, or the designee of that parent or other person with legal custody of any individual under 18 years of age by written consent of the parent or designated custodian. The protections afforded by this part against discrimination on the basis of familial status also apply to any individual who is pregnant, who is in the process of securing legal custody of any individual under 18 years of age, or who is in the process of being given care and custody of any individual under 18 years of age by a state or local governmental agency responsible for the welfare of children.

*(Added by Stats. 1992, Ch. 182, Sec. 9. Effective January 1, 1993.)*

**12955.3.** For purposes of this part, "disability" includes, but is not limited to, any physical or mental disability as defined in Section 12926.

*(Amended by Stats. 2000, Ch. 1049, Sec. 8. Effective January 1, 2001.)*

**12955.4.** Nothing in this part shall prohibit a religious organization, association or society, or any nonprofit institution or organization operated, supervised, or controlled by or in conjunction with a religious organization, association, or society, from limiting the sale, rental, or occupancy of dwellings that it owns or operates for other than a commercial purpose to persons of the same religion or from giving preference to those persons, unless membership in that religion is restricted on account of race, color, or national origin.

*(Added by Stats. 1992, Ch. 182, Sec. 11. Effective January 1, 1993.)*

**12955.5.** Nothing in this part shall preclude the government from establishing programs to collect information relating to discriminatory housing practices.

*(Added by Stats. 1992, Ch. 182, Sec. 12. Effective January 1, 1993.)*

**12955.6.** Nothing in this part shall be construed to afford to the classes protected under this part, fewer rights or remedies than the federal Fair Housing Amendments Act of 1988 (P.L. 100-430) and its implementing regulations (24 C.F.R. 100.1 et seq.), or state law relating to fair employment and housing as it existed prior to the effective date of this section. Any state law that purports to require or permit any action that would be an unlawful practice under this part shall to that extent be invalid. This part may be construed to afford greater rights and remedies to an aggrieved person than those afforded by federal law and other state laws.

*(Amended by Stats. 1993, Ch. 1277, Sec. 5.5. Effective January 1, 1994.)*

**12955.7.** It shall be unlawful to coerce, intimidate, threaten, or interfere with any person in the exercise or enjoyment of, or on account of that person having exercised or enjoyed, or on account of that person having aided or encouraged any other person in the exercise or enjoyment of, any right granted or protected by Section 12955 or 12955.1.

*(Added by Stats. 1993, Ch. 1277, Sec. 6. Effective January 1, 1994.)*

**12955.8.** For purposes of this article, in connection with unlawful practices:

(a) Proof of an intentional violation of this article includes, but is not limited to, an act or failure to act that is otherwise covered by this part, that demonstrates an intent to discriminate in any manner in violation of this part. A person intends to discriminate if race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information is a motivating factor in committing a discriminatory housing practice even though other factors may have also motivated the practice. An intent to discriminate may be established by direct or circumstantial evidence.

(b) Proof of a violation causing a discriminatory effect is shown if an act or failure to act that is otherwise covered by this part, and that has the effect, regardless of intent, of unlawfully discriminating on the basis of race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, marital status, national origin, ancestry, familial status, source of income, disability, veteran or military status, or genetic information. A business establishment whose action or inaction has an unintended discriminatory effect shall not be considered to have committed an unlawful housing practice in violation of this part if the business establishment can establish that the action or inaction is necessary to the operation of the business and effectively carries out the significant business need it is alleged to serve. In cases that do not involve a business establishment, the person whose action or inaction has an unintended discriminatory effect shall not be considered to have committed an unlawful housing practice in violation of this part if the person can establish that the action or inaction is necessary to achieve an important purpose sufficiently compelling to override the discriminatory effect and effectively carries out the purpose it is alleged to serve.

(1) Any determination of a violation pursuant to this subdivision shall consider whether or not there are feasible alternatives that would equally well or better accomplish the purpose advanced with a less discriminatory effect.

(2) For purposes of this subdivision, the term "business establishment" shall have the same meaning as in Section 51 of the Civil Code.

*(Amended by Stats. 2019, Ch. 601, Sec. 8. (SB 222) Effective January 1, 2020.)*

**12955.9.** (a) The provisions of this part relating to discrimination on the basis of familial status shall not apply to housing for older persons.

(b) As used in this section, "housing for older persons" means any of the following:

(1) Housing provided under any state or federal program that the Secretary of Housing and Urban Development determines is specifically designed and operated to assist elderly persons, as defined in the state or federal program.

(2) Housing that meets the standards for senior housing in Sections 51.2, 51.3, and 51.4 of the Civil Code, except to the extent that those standards violate the prohibition of familial status discrimination in the federal Fair Housing Amendments Act of 1988 (Public Law 100-430) and implementing regulations.

(3) Mobilehome parks that meet the standards for "housing for older persons" as defined in the federal Fair Housing Act, as amended by Public Law 104-76, and implementing regulations.

(c) For purposes of this section, the burden of proof shall be on the owner to prove that the housing qualifies as housing for older persons.

*(Amended by Stats. 2016, Ch. 714, Sec. 9. (SB 944) Effective January 1, 2017.)*

**12956.** Upon notice that a verified complaint against it has been filed under this part, any owner of housing accommodations shall maintain and preserve any and all rental records or any other written materials relevant to the complaint, until the complaint is fully and finally disposed of and all appeals or related proceedings terminated.

*(Added by Stats. 1987, Ch. 605, Sec. 5.)*

**12956.1.** (a) As used in this section.

(1) "Association," "governing documents," and "declaration" have the same meanings as set forth in Sections 4080, 4135, and 4150 or Sections 6528, 6546, and 6552 of the Civil Code.

(2) "Redaction" means the process of rerecording of a document that originally contained unlawful restrictive language, and when presented to the county recorder for rerecording, no longer contains the unlawful language or the unlawful language is masked so that it is not readable or visible.

(3) "Redacted" means the result of the rerecording of a document that originally contained unlawful restrictive language, and when presented to the county recorder for rerecording, no longer contains the unlawful language or the unlawful language is masked so that it is not readable or visible.

(b) (1) A county recorder, title company, escrow company, real estate broker, real estate agent, or association that provides a copy of a declaration, governing document, or deed to any person shall place a cover page or stamp on the first page of the previously recorded document or documents stating, in at least 14-point boldface type, the following:

"If this document contains any restriction based on age, race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, marital status, disability, veteran or military status, genetic information, national origin, source of income as defined in subdivision (p) of Section 12955, or ancestry, that restriction violates state and federal fair housing laws and is void, and may be removed pursuant to Section 12956.2 of the Government Code by submitting a "Restrictive Covenant Modification" form, together with a copy of the attached document with the unlawful provision redacted to the county recorder's office. The "Restrictive Covenant Modification" form can be obtained from the county recorder's office and may be available on its internet website. The form may also be available from the party that provided you with this document. Lawful restrictions under state and federal law on the age of occupants in senior housing or housing for older persons shall not be construed as restrictions based on familial status."

(2) The requirements of paragraph (1) shall not apply to documents being submitted for recordation to a county recorder.

(3) A title company, escrow company, or association that delivers a copy of a declaration, governing document, or deed directly to a person who holds an ownership interest of record in property shall also provide a Restrictive Covenant Modification form with procedural information for appropriate processing along with the document.

(c) Any person who records a document for the express purpose of adding a racially restrictive covenant is guilty of a misdemeanor. The county recorder shall not incur any liability for recording the document. Notwithstanding any other provision of law, a prosecution for a violation of this subdivision shall commence within three years after the discovery of the recording of the document.

*(Amended by Stats. 2021, Ch. 359, Sec. 1. (AB 1466) Effective January 1, 2022.)*

**12956.2.** (a) (1) A person who holds or is acquiring an ownership interest of record in property that the person believes is the subject of an unlawfully restrictive covenant in violation of subdivision (l) of Section 12955 may record a document titled Restrictive Covenant Modification. A title company, escrow company, county recorder, real estate broker, real estate agent, or other person also may record the modification document provided for in this section. The county recorder may waive the fee prescribed for recording and indexing instruments pursuant to Section 27361 in the case of a restrictive covenant modification document. The modification document shall include a complete copy of the original document containing the unlawfully restrictive language with the unlawfully restrictive covenant language redacted.

(2) Beginning July 1, 2022, if a title company, escrow company, real estate broker, or real estate agent has actual knowledge that a declaration, governing document, or deed that is being directly delivered to a person who holds or is acquiring an ownership interest in property includes a possible unlawfully restrictive covenant, they shall notify the person who holds or is acquiring the ownership interest in the property of the existence of that covenant and their ability to have it removed through the restrictive covenant modification process. There shall be no presumption that a party providing a document has read the document or has actual knowledge of its content.

(3) Beginning July 1, 2022, if requested before the close of escrow, the title company or escrow company directly involved in the pending transaction shall assist in the preparation of a Restrictive Covenant Modification pursuant to this section, but the title company or escrow company shall have no liability associated with the recordation of a Restrictive Covenant Modification that contains modifications not authorized by this section on behalf of the requester.

(b) (1) Before recording the Restrictive Covenant Modification document, the county recorder shall submit the modification document and the original document to the county counsel who shall determine whether the language in the original document contains an unlawful restriction based on age, race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, marital status, disability, veteran or military status, national origin, source of income as defined in subdivision (p) of Section 12955, or ancestry. The county counsel shall return the documents and inform the county recorder of its determination within a period of time specified in paragraph (2). The county recorder shall refuse to record the modification document if the county counsel or their designee finds that the original document does not contain an unlawful restriction as specified in this subdivision or the modification document contains modifications not authorized by this section.

(2) For documents recorded pursuant to subdivision (a), the period of time shall be a reasonable period of time, not to exceed three months, from the date the request for recordation is made, unless extraordinary circumstances apply.

(c) If a person requests to record a modification document, that person shall provide a return address in order for the county recorder to notify this person of the action taken by the county counsel on the respective property. The notice required pursuant to this subdivision may be made on a postcard mailed by first-class mail.

(d) The modification document shall be indexed in the same manner as the original document being modified. It shall contain a recording reference to the original document in the form of a book and page or instrument number, and date of the recording.

(e) Subject to covenants, conditions, and restrictions that were recorded after the recording of the original document that contains the unlawfully restrictive language and subject to covenants, conditions, and restrictions that will be recorded after the Restrictive Covenant Modification, the restrictions in the Restrictive Covenant Modification, once recorded, are the only restrictions having effect on the property. The effective date of the terms and conditions of the modification document shall be the same as the effective date of the original document.

(f) A Restrictive Covenant Modification form shall be prepared and accepted for submission and recordation in all counties in substantially the following form:

RESTRICTIVE COVENANT MODIFICATION:

The following reference document contains a restriction based on age, race, color, religion, sex, gender, gender identity, gender expression, sexual orientation, familial status, marital status, disability, veteran or military status, genetic information, national origin, source of income as defined in Section 12955 of the Government Code, or ancestry, that violates state and federal fair housing laws and is void. Pursuant to Section 12956.2 of the Government Code, this document is being recorded solely for the purpose of redacting and eliminating that restrictive covenant as shown on page(s) \_\_\_\_ of the document recorded on \_\_\_\_\_(date) in book \_\_\_\_\_ and page \_\_\_\_\_ or instrument number \_\_\_\_\_ of the official records of the County of \_\_\_\_\_, State of California.

Attached hereto is a true, correct and complete copy of the document referenced above, with the unlawful restrictive covenant redacted.

This modification document shall be indexed in the same manner as the original document being modified, pursuant to subdivision (d) of Section 12956 of the Government Code.

The effective date of the terms and conditions of the modification document shall be the same as the effective date of the original document.

(Signature of submitting party)

\_\_\_\_\_ County Counsel, or their designee, pursuant to paragraph (1) of subdivision (b) of Section 12956.2 of the Government Code, hereby states that it has determined that the original document referenced above contains an unlawful restriction and this modification may be recorded.

Or

\_\_\_\_\_ County Counsel, or their designee, pursuant to paragraph (1) of subdivision (b) of Section 12956.2 of the Government Code, finds that the original document does not contain an unlawful restriction, or the modification document contains modifications not authorized, and this modification may not be recorded.

County Counsel

By:

Date:

(g) The county recorder shall make available to the public Restrictive Covenant Modification forms onsite in an appropriately designated area, or online on the county recorder's internet website, either of which shall be deemed

to satisfy the requirement of paragraphs (1) and (2) of subdivision (b) of Section 12956.1 to provide a Restrictive Covenant Modification form if the procedural information for appropriate processing is attached to the form. Those forms shall permit multiple submissions on behalf of different homes and for processing homes in batches with respect to a modification document that affects multiple homes or lots. The forms shall also permit the submission of a restrictive covenant modification form for a homeowners' association or a common interest development to modify covenants, conditions, and restrictions that will correct unlawfully restrictive covenants for multiple dwellings within a subdivision.

(h) If a person causes to be recorded a modified document pursuant to this section that contains modifications not authorized by this section, the county recorder shall not incur liability for recording the document. The liability that may result from the unauthorized recordation is the sole responsibility of the person who caused the modified recordation as provided in subdivision (a).

(i) (1) A restrictive covenant modification that is approved by county counsel or their designee and recorded pursuant to this section removes the illegal covenant from all property affected by the original covenant regardless of who submits the modification.

(2) This section does not affect the obligations of the governing board of a common interest development as defined in Section 4100 or 6534 of the Civil Code if the board of directors of that common interest development is subject to the requirements of subdivision (b) of Section 4225 or of subdivision (b) of Section 6606 of the Civil Code.

(j) For purposes of this section, "redaction" and "redacted" mean the same as defined in Section 12956.1.

*(Amended by Stats. 2021, Ch. 359, Sec. 2. (AB 1466) Effective January 1, 2022.)*

**12956.3.** (a) The county recorder of each county shall establish a restrictive covenant program to assist in the redaction of unlawfully restrictive covenants in violation of subdivision (l) of Section 12955.

(b) Each county recorder as part of their restrictive covenant program shall undertake all of the following:

(1) By July 1, 2022, prepare an implementation plan, which shall be publicly available and may be posted on the internet website of the county recorder, that does all of the following:

(A) Outlines how the county recorder will carry out the identification and redaction of unlawfully restrictive covenants.

(B) Provides timelines for when elements of their plan will be accomplished.

(C) Provides how the county recorder's office plans to track and maintain a record of homes with unlawfully restrictive covenants once they have been identified.

(2) Identify unlawfully restrictive covenants in violation of subdivision (l) of Section 12955 in the records of the county recorder's office.

(3) Beginning January 1, 2022, index a restrictive covenant modification document under the title of "Restrictive Covenant Modification" and shall make that index available in their office for the public, and if the county recorder has an index online, include the title in the online index.

(4) Redact unlawfully restrictive covenants in the records of the respective county recorder's office, subject to county counsel approval, by rerecording a copy of the original document with the unlawfully restrictive language redacted so that it is not readable or visible, using a Restrictive Covenant Modification Form substantially similar to the form set forth in subdivision (f) of Section 12956.2.

(c) The county recorder shall retain each nonredacted record for future reference and public request needs.

(d) (1) The County Recorders Association of California shall submit status reports on the progress of each county's restrictive covenant program established pursuant to this section by January 1, 2023, and January 1, 2025, to the Legislature. The report may describe the number of documents identified for redaction, and the implementation timelines for actions taken by each county recorder's office.

(2) The County Recorders Association of California shall convene a best practices meeting to share concepts on implementation of this section no later than December 31, 2022, with all California county recorder offices and meet annually thereafter until December 31, 2027.

(e) Nothing in this section shall be construed to restrict, delay, or modify access to any official record, or modify any existing agreements regarding access to any official record.

(f) For purposes of this section "redaction" and "redacted" mean the same as defined in Section 12956.1.

(g) The failure of a county recorder to identify or redact illegal restrictive covenants, as required by this section, or the county recorder's identification or redaction of any restrictive covenants that are later determined not to be illegal, shall not result in any liability against the county recorder or the county.

*(Added by Stats. 2021, Ch. 359, Sec. 3. (AB 1466) Effective January 1, 2022.)*

**12957.** (a) It is the policy of this state and the purpose of this section to facilitate and support the development and operation of housing for homeless youth.

(b) The provision of housing for homeless youth is hereby authorized and shall not be considered unlawful age discrimination, notwithstanding any other provision of law, including, but not limited to, Sections 51, 51.2, and 51.10 of the Civil Code, Sections 11135, 12920, and 12955 of this code, Chapter 11.5 (commencing with Section 50800) of Part 2 of Division 31 of the Health and Safety Code, and local housing or age discrimination ordinances.

(c) This section shall not be construed to permit discrimination against families with children.

(d) This section shall occupy the field of regulation of housing for homeless youth by any local public entity, including, but not limited to, a city, county, and city and county.

(e) For purposes of this section, the following definitions shall apply:

(1) "At risk of becoming homeless" means facing eviction or termination of one's current housing situation.

(2) "Homeless youth" means either of the following:

(A) A person who is not older than 24 years of age, and meets one of the following conditions:

(i) Is homeless or at risk of becoming homeless.

(ii) Is no longer eligible for foster care on the basis of age.

(iii) Has run away from home.

(B) A person who is younger than 18 years of age, who is emancipated pursuant to Part 6 (commencing with Section 7000) of Division 11 of the Family Code, and who is homeless or at risk of becoming homeless.

(3) "Housing for homeless youth" means emergency, transitional, or permanent housing tied to supportive services that assist homeless youth in stabilizing their lives and developing the skills and resources they need to make a successful transition to independent, self-sufficient adulthood.

*(Added by Stats. 2016, Ch. 870, Sec. 15. (SB 1442) Effective January 1, 2017.)*

## **Appendix A SaaS Application & Hosting Services**

- I. Description of the SaaS Application and Hosted Services**
- II. SaaS Data Centers**
- III. SaaS Maintenance Services**
- IV. City Responsibilities**
- V. Technical Support & Training**

**I. Description of the SaaS Application and Hosted Services:** “SaaS Application and Hosted Services” include the following services:

**A. Hosting City’s Content / Imaged Product:** Contractor shall host the City’s Content and Imaged Product as defined in Article 1 of this Agreement.

**B. Access Services:**

A.B.1 Contractor shall allow access to the Imaged Product to City enabled users via the City's Website and/or End User's processing environment from one or more of Contractor's data repositories. Members of the public authorized by City program administrators to view the Imaged Product will be able to do so through the Website created by Contractor for City for public viewing.

A.B.2 Contractor shall provide City Designated Master Administrator Rights to create other Master Administrators, Administrators, or End Users. City Designated Master Administrators or others as approved by City Master Administrator shall issue passwords to City's employee End Users authorizing these employees to view City's Content. Adding or removing City employee End Users will be at the discretion of the Assessor-Recorder Master Administrator or his/her designee(s). City acknowledges that Contractor shall have no rights to allow end user access to the City data and that all user access and data suitability and confidentiality is at the discretion and responsibility of the City alone.

A.B.3 For documents that have been OCR'd, End Users shall be able to search using keywords that appear anywhere in the record (e.g., parcel address, APN, or party name). For records that have not been OCR'd, End Users shall be able to search by several fields, including but not limited to: book and page number, reel and image number, certificate year and number, and document number depending on the type of record being searched.

**C. Software:** Use of Contractor’s Software operating on hosted equipment located at Contractor’s facility and/or any Data Center as further outlined under Section II (SaaS Data Centers) of this Appendix B. This includes the Digital Reel software provided by BMI. City

shall be given unlimited Internal User Licenses for the most recent browser and/or software version.

**D. Reserved (Third-Party Software)**

**E. Remote Software:** Contractor shall provide access to and use of a remote software tool for City management of Authorized Users, access rights and other similar role-based controls as they pertain to the SaaS Services. Method will be published through Contractor portal and be made available to Authorized Users with elevated privileges.

**F. Back-Up of City's Data:**

1. Reserved (Online hourly data retention for SaaS Software operation and functionality)
2. If there are changes to the data being stored by Contractor, Contractor will create and maintain updated hard drive backups of all City data at a secure offline archive.

**E. SaaS Environments:** The SaaS Application and Hosted Services shall be hosted in one Tier-2 and one certified and secure Tier-4 data hosting center.

1. A single Back-up Environment available as needed to serve as the backup or “failover” environment for the SaaS and Hosted Services
2. A single test environment available to the Contractor for the evaluation and eventual promotion of SaaS Software updates, patches, fixes or otherwise deemed tests.

**F. Reporting:** Contractor shall provide electronic notification within 2 hours of discovery and subsequent monthly reporting of any incidents or breaches that had occurred within the environment or to the hosted application. In the event of a breach, Contractor shall follow the procedures set forth in Section 13.1.5 of the Agreement.

**G. Availability of SaaS Services:** Contractor (or its Hosting Service contractor) shall host the **SaaS Services** on computers owned or controlled by Contractor (or its contractor) and shall provide the City with access to multiple production locations with SaaS Application and data a via Internet-access to use according to the terms herein.

**1. Hosted System Uptime:** Other than Scheduled SaaS Maintenance Services as outlined in Section III, emergency maintenance described below, Force Majeure as described in the Agreement and lack of Internet availability as described below, Contractor shall provide uptime to the SaaS Application and Hosted Service to achieve a 99.9% Service Level Availability.

**2. Scheduled SaaS Maintenance**



- i. Contractor shall conduct Scheduled SaaS Maintenance during the following hours: on Weekends or National Holidays.
- ii. Scheduled SaaS Maintenance shall not exceed an average of 4 hours per month over a twelve (12) month period except for major scheduled upgrades.
- iii. Contractor shall provide City with no less than twenty-four (24) hours' notice prior to hosted SaaS Application unavailability due to planned maintenance (other than during Contractor's standard maintenance window outside of normal business hours or over the weekend).
- iv. Contractor shall provide as much notice as is practicable under the circumstances for updates and fixes which must be applied on a more urgent basis.
- v. Contractor will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature.
- vi. Excluding the foregoing events, Contractor warrants that the hosted SaaS Application will be generally available no less than ninety-nine point nine percent (99.9%) of each calendar month. For each calendar month during which the availability of the hosted SaaS Application does not achieve the established standard, Contractor will provide a credit as set forth in Exhibit 1, provided substandard availability is identified by City in writing or by e-mail to Contractor and can be objectively verified.

**3. Unscheduled SaaS Maintenance.** Contractor shall use commercially reasonable efforts to prevent more than one (1) hour of continuous down time during business hours in any month for which unscheduled SaaS maintenance is required. If Contractor fails to meet this obligation for a period of three successive calendar months, Contractor shall furnish City with a Performance Credit in the amount of 10% of the Services Fees (as calculated on a monthly basis for the reporting month).

**4. Emergency Maintenance.** If Force Majeure Events or emergencies arise or continue, Contractor shall be entitled to take any actions that Contractor, in good faith, determines is necessary or advisable to prevent, remedy, mitigate, or otherwise address actual or potential harm, interruption, loss, threat, security or like concern to any of the SaaS systems or the SaaS Software. Such emergency maintenance may include, but is not limited to: analysis, testing, repair, maintenance, re-setting and other servicing of the hardware, cabling, networks, software and other devices, materials and systems through which access to and/or use of the SaaS Software by City is made available. Contractor shall endeavor to provide advance written notice of such emergency maintenance to City as soon as is reasonably possible.

**5. Notice of Unavailability:** In the event there will be more than thirty (30) minutes down time of any SaaS or Hosted Service components for any reason, including but not limited to, Scheduled SaaS Maintenance or emergency maintenance, Contractor shall provide notice to users by posting a web page that indicates that the site is temporarily unavailable and to please come back later. Contractor shall also provide advanced e-mail notice to

ASRIT@sfgov.org which will include at least a brief description of the reason for the down time and an estimate of the time when City can expect the site to be up and available.

**H. Changes in Functionality.** During the term of this Agreement, Contractor shall not reduce or eliminate functionality in SaaS Services. Where Contractor has reduced or eliminated functionality in SaaS Services, City, in its sole election, shall have, the right to immediately terminate this Agreement and be entitled to a return of any prepaid fees. Where Contractor increases functionality in the SaaS Services, such functionality shall be provided to City without any increase in the Services fees.

## II. SaaS Data Centers

**A. Control:** The method and means of providing the Services shall be under the exclusive control, management, and supervision of Contractor, giving due consideration to the requests of City. Contractor, or any previously approved subcontractor, shall provide the Services (including data storage) solely from within the continental United States and on computing and data storage devices residing in the United States.

### **B. Data Center Standards.**

Contractor's Data Centers shall have fully redundant and diverse network paths to City endpoints. Data Centers shall be located in geographically different seismic zones characterized by the lowest predicted chance of damage as defined by the US Geological Survey Earthquake Hazards Program.

Environmental systems must monitor/detect temperature, humidity, fluid leaks, fire/smoke/particulate and have accompanying suppression systems. Power should be fully conditioned to avoid spikes and other aberrations that can damage equipment. Temporary power units, such as generators, must be in place to support SaaS Services in the event of a power outage for up to three calendar days, at a minimum of the Tier 4 site.

**C. Location:** The location of the approved Data Centers that will be used to host the SaaS Application are as follows:

**Primary Tier 4 data center:**

NTT Global Data Center CA-1 1200 Striker Ave Sacramento

**Back-up Tier 2 data center:**

BMI Imaging Systems 1115 East Arques Sunnyvale

**D. Replacement Hosted Provider:** In the event Contractor changes the foregoing Hosted Provider, Contractor shall provide City with prior written notice of said change and disclose the name and location of the replacement Hosted Provider. The replacement Hosted Provider shall be a reputable Hosted Provider comparable to Contractor's current Hosted Provider, and said replacement Hosted Provider shall be located within the United States. The replacement Hosted Provider shall perform a SOC 1 and/or SOC 2, Type 2 Report Audit Report at least annually, in accordance with Section 13.3 of this Agreement.

**E. Notice of Change:** If the location of the Data Center used to host the SaaS Application is changed, Contractor shall provide City with written notice of said change at least sixty (60) days prior to any such change taking place. Contractor shall disclose the address of the new facility, which shall be within the United States. The Data Centers referenced above are subcontractors that must be approved by City.

**F. Subcontractors.** Contractor shall not enter into any subcontracts for the performance of the Services, or assign or transfer any of its rights or obligations under this Agreement, without City's prior written consent and any attempt to do so shall be void and without further effect and shall be a material breach of this Agreement. Contractor's use of subcontractors shall not relieve Contractor of any of its duties or obligations under this Agreement.

### **III. SaaS Maintenance Services.**

**A.** The SaaS Software maintained under this Agreement shall be the SaaS Software set forth in Appendix A to this Agreement.

**B.** The following SaaS Maintenance Services are included as part of this Agreement:

**1. Contractor Software Version Upgrades, Software Revisions and Patches.** Contractor shall provide and implement all SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software Patches to ensure: (a) that the functionality of the SaaS Software and Services, as described in the Documentation, is available to Authorized Users; (b) that the functionality of the SaaS Software and Services is in accordance with the representations and warranties set forth herein, including but not limited to, the SaaS Software and Services conforming in all material respects to the specifications, functions, descriptions, standards, and criteria set forth in the Documentation; (c) that the Service Level Standards can be achieved; and (d) that the SaaS Software Services work with the non-hosted browser version.

- i. **Planning:** Contractor must assist the City with the planning and logistics of upgrades and updates of any significant functionality changes or major revisions, but Contractor may make security updates or bug fixes without notice.
- ii. **Technical Assistance.** Contractor must provide technical assistance regarding release notes, new functionality, and new application workflows.
- iii. **Deployment:** Deployment of these revisions will be mutually agreed upon between Contractor and City.
- iv. **Software Releases:** Release of Software revisions as defined will be conducted on a schedule as determined by Contractor. Contractor shall provide no less than a thirty (30) calendar day prior written notice of when any such revision is scheduled to be released. City will be granted a fifteen (15) calendar day

evaluation window to review release documentation regarding software modules being impacted and general revision changes.

- v. **Testing.** After the evaluation period, Contractor shall conduct a deployment of the revision to the City test environment. The Software deployment will be scheduled in writing five (5) calendar days prior to actual deployment activities. As part of the upgrade activities within the Test Environment, Contractor may provide nominal testing to ensure all systems are functional and the revision deployment was successful. Post deployment activities include an e-mail or portal post to serve as written notification that this service has been completed. City shall have forty-five (45) calendar day test window in which City has ability to test and raise issues with Contractor. Test environment deployment activities will be conducted during a mutually agreed-to time window and may not necessarily align with the production maintenance windows as described within this document.
- vi. **Severity 1 and Severity 2 Incident Correction:** If a SaaS Severity Level 1 or Severity Level 2 Issue is identified and appropriately triaged and classified by both Contractor and City during the test environment deployment test window, Contractor shall correct the SaaS Issue. The severity of a SaaS Issue will be initially defined by the City and confirmed by Contractor. Until the SaaS Issue has been resolved, the Severity Level may be raised or lowered based on Contractor's analysis of impact to business. If the SaaS Issue can be corrected and can be redeployed within the remainder of the deployment test window, City will have an additional five (5) testing days in which to evaluate and further test for the SaaS Issue resolution. If the SaaS Issue cannot be corrected within the remainder of the test window, Contractor will deploy immediately upon availability with as much notice as practicable. City will be allowed an additional five (5) testing days to evaluate the correction post the test window if desired.
- vii. **Testing Suspension:** If at any time during the testing window City identifies the presence of multiple SaaS Severity Level 1 or Severity Level 2 Issues that can be shown to materially impact City ability to continue testing, City may in writing elect to suspend testing until corrections for the SaaS Issues can be provided. Contractor will deploy corrections immediately upon availability with as much notice as practicable. Upon release of corrections, City will have five (5) calendar days to commence the testing within the then available remaining testing window.
- viii. **Software Promotion:** Contractor will promote revision from Test Environment to Production and Back-up environments after the

provided test window has elapsed. The Software promotion will be scheduled in writing five (5) calendar days prior to actual deployment activities. As part of the promotion activities within the Production and Back-up environment, Contractor may provide nominal testing to ensure all systems are functional and the revision promotion was successful. Post promotion activities include an e-mail or portal post to serve as written notification that this service has been completed. At the point of e-mail or portal posting, the new revision will be considered “in production” and supported under the maintenance service terms described here within.

- ix. **Documentation.** In support of such SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software patches, Contractor shall provide updated user technical documentation reflecting the SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software patches as soon as reasonably practical after the SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software Patches have been released. Updated user technical documentation that corrects SaaS Software Errors or other minor discrepancies will be provided to Contractor’s customers when available.
- x. **Training.** Contractor must provide standard training using Contractor’s upgrade tools and provide ongoing knowledge transfer to the City.

## 2. Reserved (Third-Party Software Revisions)

**C. Response to SaaS Issues.** Contractor shall provide verbal or written responses to SaaS Issues identified by City in an expeditious manner. Such responses shall be provided in accordance with the Target Response Times defined under Section V (Technical Support).

**D. SaaS Software Maintenance Acceptance Period.** Unless otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, City shall have a twenty (20) business day period to test any maintenance changes prior to Contractor introducing such maintenance changes into production. If the City rejects, for good cause, any maintenance changes during the SaaS Software Maintenance Acceptance Period, Contractor shall not introduce such rejected maintenance changes into production. At the end of the Maintenance Acceptance Period, if City has not rejected the maintenance changes, the maintenance changes shall be deemed to be accepted by City and Contractor shall be entitled to introduce the maintenance changes into production.

**E. SaaS Hardware:** Contractor shall use commercially reasonable efforts to ensure that all hardware (including servers, routers, and other related equipment) on which the SaaS Application is deployed are attached to back-up power systems sufficient to maintain the site’s availability for so long as any power outage could reasonably be expected to occur, based on the

experience of Contractor at its deployment location and consistent with the Tier rating of the Data Center required under Section (I)(E) of this Appendix.

**F. Preventative Maintenance:** Contractor shall perform preventative maintenance of the SaaS Application, its servers, and other facilities in accordance with its normal maintenance schedules and procedures. Contractor shall follow the maintenance notifications detailed in Appendix A.

**IV. City Responsibilities**

**A.** City shall provide Contractor with timely notification of any SaaS Issues or SaaS Software Errors by either of these methods:

1. **Contacting Contractor’s Customer Support at 1-800-359-3456 x237.**
2. **By entering the problem on Contractor’s Service Portal.** Notifications can be submitted through the City Portal, which is available via the Support link on the system login page. This is the preferred method by which to contact Contractor.
3. If City cannot readily access Contractor’s portal, City may contact Contractor at the “800” number listed above.

**B. Support for Problem Investigation.** City shall support all reasonable requests by Contractor as may be required in problem investigation and resolution.

**C. SaaS Incident Manager: Designation of Point of Contact.** City shall assign an individual or individuals to serve as the designated contact(s) for all communication with Contractor during SaaS Issue investigation and resolution.

**D. Discovery of SaaS Software Errors.** Upon discovery of a SaaS Software Error, City agrees, if requested by Contractor, to submit to Contractor a listing of output and any other data that Contractor may require in order to reproduce the SaaS Software Error and the operating conditions under which the SaaS Software Error occurred or was discovered.

**V. 24X7 Technical Support:**

**A. 24x7 Technical Support:** Authorized City Admins will make Technical Support requests 24/7 by submitting a request via Contractor’s service desk web portal. The Technical Support staff shall assign to the request the Incident Severity Level indicated by the City. All Security Level Incidents will be addressed and responded to starting and ending during the standard business hours of 6:00 a.m. - 6:00 p.m. US Pacific Time.

Incident Severity Level	<i>Target Response Time</i>
Severity Level 1: Requires immediate attention– Critical production functionality is not available or a large number of users cannot access the SaaS Application. Causes a major	Request Response Time: 15 minutes.

<b>Incident Severity Level</b>	<b><i>Target Response Time</i></b>
business impact where service is lost or degraded and no workaround is available, preventing operation of the business.	Request Resolution Time Target: < 2 hours.  Maximum Permitted Request Resolution Time: < 12 hours  <b><i>City shall be entitled to a Service Credit of 15% of the Monthly Hosting Fee paid for each failure timely to achieve resolution. If Fees are paid annually, the 15% shall apply to 1/12 of that annual fee.</i></b>
<b>Severity Level 2:</b> Requires priority attention - Some important production functionality is not available, or a small number of users cannot access the system. Causes significant business impact where service is lost or degraded and no workaround is available; however, the business can continue to operate in a limited fashion.	Request Response Time: 30 minutes Request Resolution Time Target: < 4 hours  Maximum Permitted Request Resolution Time: < 48 hours  <b><i>City shall be entitled to a Service Credit of 10% of the Monthly Hosting Fee paid for each failure timely to achieve resolution. If Fees are paid annually, the 10% shall apply to 1/12 of that annual fee.</i></b>
<b>Severity Level 3:</b> Requires attention –There is a problem or inconvenience. Causes a business impact where there is minimal loss of service and a workaround is available such that the system can continue to operate fully and users are able to continue business operations.	Request Response Time: 1 hr. Request Resolution Time Target: < 8 hours  Maximum Permitted Request Resolution Time: < 96 hours  <b><i>City shall be entitled to a Service Credit of 5% of the Monthly Hosting Fee paid for each failure timely to achieve resolution. If Fees are paid annually, the 15% shall apply to 1/12 of that annual fee.</i></b>
<b>Severity Level 4:</b> There is a problem or issue with no loss of service and no business impact.	Request Response Time: 4 hr. Request Resolution Time Target: < 96 hours  Maximum Permitted Request Resolution Time: < 7 days

**1. SERVICE CREDIT ESCALATION.**

In the event of a Severity Level 1 issue that is not resolved sufficiently quickly as determined in the City's sole discretion, City may escalate the problem to Contractor's Chief Technology Officer.

**2. ROOT CAUSE ANALYSIS**

Following the resolution of a Severity Level 1 OR Level 2 incident, Contractor will discuss with City the cause of the failure, the actions Contractor took to resolve the failure, a timeline of the event and the actions Contractor plans to take to prevent such failure from recurring, and, if requested, Contractor will provide City a written summary of such discussion. Contractor will, on request, provide detailed documentation of the root cause analysis and preventative actions taken or planned with clear dates for completion of the action(s).



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: As-Needed Set-Up/Installation & Break-Down of Barricades, Fences, & Traffic Safety Equipment

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$750,000

**1. Description of Work**

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

Contractors shall provide set-up/installation and break-down services of barricades, fencing, and other crowd and traffic safety equipment that are rented, and at times, may be purchased by City departments, to ensure public safety during various special events (e.g., Pride Parade, Warriors championship parade, Fleet Week) and for other circumstances, including street/sewer paving and repair, vehicular accidents, etc. that require temporary crowd and/or traffic safety control measures.

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

The City requires timely set-up and removal of temporary barricades, fencing, and other crowd and traffic safety control equipment to ensure public safety during special events (e.g., parades, Fleet Week) and other circumstances (e.g., street/sewer paving and repair) that take place in public spaces and the public right-of-way. Because these services are primarily temporary crowd and traffic safety needs, the City typically requires a short-term rental of equipment. Contractors own and bear responsibility for a safe and proper setup and removal of the rental equipment. Should such services be denied, contractors will not agree to rent their barricades, fences, and other crowd and traffic safety equipment to the City as contractors will not be able to ensure the proper setup, functioning, and removal of their property. This, in turn, would put public safety at risk during the events, such as the Pride Parade, Fleet Week, and in the vicinity of critical street/sewer/right-of-way repairs. Further, if these services are denied, the City would need to purchase, store, and maintain all such equipment, which is operationally infeasible due to no storage and needs are intermittent and on a temporary basis.

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 previously provided using other City procurement methods.

D. Will the contract(s) be renewed?

No.

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

not applicable

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

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

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

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

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

B. Explain the qualifying circumstances:

The set-up/installation and break-down of barricades, fencing, and other crowd and traffic safety equipment services are required on a temporary and immediate basis during special events (e.g., Pride Parade, Fleet Week), vehicular accidents, temporary street/sewer paving and repair work, or other unanticipated circumstances in the public right-of-way that poses a risk to public safety. The City also lacks the resources and storage facilities to own, maintain, and store all such equipment when needs are intermittent and on a temporary basis.

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

A. Specify required skills and/or expertise: Contractors must have knowledge and experience with handling hand tools and power tools for properly setting up various barricades, fences, and other equipment used in crowd and traffic control. The ability to read and understand instructions, plans, and maps of events and work zone locations is also required.

B. Which, if any, civil service class(es) normally perform(s) this work? 7220, Asphalt Finisher Supervisor 1; 7311, Cement Mason; 7344, Carpenter; 7404, Asphalt Finisher; 7421, Sewer Maintenance Worker; 7449, Sewer Service Worker; 7501, Environmental Service Worker; 7502, Asphalt Worker; 7514, General Laborer; 8208, Park Patrol Officer; 9212, Airport Safety Officer; Q050, Sergeant, (Police Department);

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractors will provide rental barricades, fencing, and other crowd and traffic safety equipment, and store them in their facilities.

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

No resources are available within the City as these services are primarily performed on non-City-owned equipment. Services are typically needed intermittently and under temporary circumstances.

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

A. Explain why civil service classes are not applicable.

The set-up/installation and break-down services of rented barricades, fencing, and other crowd and traffic safety equipment for events (e.g., parades, Fleet Week) and other short-term circumstances (e.g., street/sewer paving and repair) that take place in public spaces and the public right-of-way must be performed by the contractors because the equipment is the property of the contractors. Contractors ensure safe and proper use of their equipment in performing these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Services are needed only on a temporary and intermittent basis, such as for special events (e.g., Pride Parade, Fleet Week) or during temporary repair work in the public right-of-way. Once such crowd and traffic safety equipment are set up, further services are typically not required until equipment is to be removed at the end of a parade or repair work. Further, when the City rents such equipment, services must be performed by the contractors to ensure safe and proper setup and removal.

**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 07/22/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Carpenters, Local 22; Cement Masons, Local 580; Laborers, Local 261; Plumbers, Local 38; SEIU 1021 Miscellaneous; SFPOA - Q2-Q50

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, Room 430, 1 Dr. Carlton B. Goodlett Pl. San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46672 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)  
**To:** [RECEIPT for Union Notification for PSC 46672 - 22/23 more than \\$100k](mailto:Khaw, Lynn (ADM); mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; Jason Klumb; Frigault, Noah (HRC); Meyers, Julie (HSA); Thomas Vitale; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); pcamarillo_seiu@sbcglobal.net; wendy.frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); david.canham@seiu1021.org; jtanner940@aol.com; laborers261@gmail.com; djohnson@opcmialocal300.org; smcgarry@nccrc.org; Khaw, Lynn (ADM); DHR-PSCCoordinator, DHR (HRD)</a><br/><b>Subject:</b> Receipt of Notice for new PCS over $100K PSC # 46672 - 22/23<br/><b>Date:</b> Friday, July 22, 2022 4:23:30 PM</p><hr/></div><div data-bbox=)

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 46672 - 22/23 for \$750,000 for Initial Request services for the period 10/18/2022 – 10/17/2027. 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/18951> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

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

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

**From:** [Khaw, Lynn \(ADM\)](#)  
**To:** [larryjr@ualocal38.org](mailto:larryjr@ualocal38.org); [ichiarenza@ualocal38.org](mailto:ichiarenza@ualocal38.org)  
**Subject:** FW: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23  
**Date:** Monday, September 26, 2022 9:26:00 AM

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

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of lynn.khaw@sfgov.org  
Sent: Friday, July 22, 2022 4:00 PM  
To: Khaw, Lynn (ADM) <lynn.khaw@sfgov.org>; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; Jason Klumb <Jason.Klumb@seiu1021.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; Meyers, Julie (HSA) <Julie.Meyers@sfgov.org>; Thomas Vitale <thomas.vitale@seiu1021.org>; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC) <kbasconcillo@sfgwater.org>; pcamarillo\_seiu@sbcglobal.net; wendy.frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA) <sin.yee.poon@sfgov.org>; david.canham@seiu1021.org; jtanner940@aol.com; laborers261@gmail.com; djohnson@opcmialocal300.org; smcgarry@nccrc.org; Khaw, Lynn (ADM) <lynn.khaw@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>  
Subject: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23

RECEIPT for Union Notification for PSC 46672 - 22/23 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 46672 - 22/23 for \$750,000 for Initial Request services for the period 10/18/2022 – 10/17/2027. 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/18951> 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

## Khaw, Lynn (ADM)

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**From:** Khaw, Lynn (ADM)  
**Sent:** Wednesday, September 21, 2022 12:32 PM  
**To:** Theresa Foglio  
**Cc:** Cheng, Paul (ADM); Choi, Suzanne (HRD); dhr-psccoordinator@sfgov.org  
**Subject:** RE: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23  
**Attachments:** PSC for Set-up/Break-down of Barricades/Fencing/Traffic Safety Equipt

Hello Theresa,

Thank you for getting back to me. Attached, please see the email from San Francisco Public Works (SFPW) certifying our discussion below.

I will attach this email with SFPW's attachment to our submission to Civil Service Commission.

Regards,

Lynn

--

**From:** Theresa Foglio <laborers261@gmail.com>  
**Sent:** Tuesday, September 13, 2022 4:30 PM  
**To:** Khaw, Lynn (ADM) <lynn.khaw@sfgov.org>  
**Cc:** Cheng, Paul (ADM) <paul.cheng@sfgov.org>  
**Subject:** Re: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23

Hello Lynn,

Thank you so much for the clarification! "a letter to the Civil Service Commission informing them that we are not replacing the employees that are currently doing the services as a part of their daily operations." would be great!

On Wed, Sep 7, 2022 at 3:19 PM Khaw, Lynn (ADM) <[lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)> wrote:

Hello Theresa,

Sorry for my delayed response as we are in the middle of office renovation, and it was a very hectic time for the past few weeks.

These are our responses to your questions.

City employees perform street repairs and deploy their own A-frame barricades and safety signage for daily operations. The City contracts for large special events services such as Pride and parades for the Warriors.

San Francisco Public Works has only placed a request for contracted safety control measures when working on special projects in heavily traffic areas or MUNI right of way along Market St. These projects are few and far between and often require detouring traffic and monitoring sign installations. To give you an idea, in the past five years, this request was made once for a project at the intersection of Gough and Market.

In response to your question about a threshold for contracting out services, there is no threshold.

We will continue to utilize City Employees for providing street/sewer paving and repair work.

To clarify this, we can submit a letter to the Civil Service Commission informing them that we are not replacing the employees that are currently doing the services as a part of their daily operations.

Thank you,  
Lynn

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

From: Khaw, Lynn (ADM)  
Sent: Thursday, August 18, 2022 5:29 PM  
To: 'Theresa Foglio' <[laborers261@gmail.com](mailto:laborers261@gmail.com)>  
Cc: Cheng, Paul (ADM) <[paul.Cheng@sfgov.org](mailto:paul.Cheng@sfgov.org)>  
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23

Hello Theresa,

Thank you for getting back to me. I will respond to your questions after checking in with our buyer and the department.

Thank you,  
Lynn

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

From: Theresa Foglio <[laborers261@gmail.com](mailto:laborers261@gmail.com)>  
Sent: Wednesday, August 17, 2022 9:49 PM  
To: Khaw, Lynn (ADM) <[lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)>  
Cc: Cheng, Paul (ADM) <[paul.cheng@sfgov.org](mailto:paul.cheng@sfgov.org)>  
Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 46672 - 22/23

Hello,

Sorry for the delay. It would probably be best if we ask the following questions instead of trying to schedule a time to meet:

We have historically set up barricades, k-rails, traffic indicators, highrises, etc for special events on a smaller to mid-scale and for all to most street/sewer paving and repair. We noticed in the contract that it is also to cover "and other circumstances (e.g., street/sewer paving and repair) that take place in public spaces and the public right-of-way." What is the threshold for street/sewer paving and repair? Will this be for minor repairs? What will determine the use of this contract vs. city employees continuing to provide this service? What is the purpose of contracting out for street/sewer paving and repair that is currently being performed by our bargaining unit?

On Wed, Jul 27, 2022 at 4:56 PM Khaw, Lynn (ADM) <[lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)> wrote:

>  
> Hello Theresa,  
>  
>  
>  
> Please let me know your availability to go over PSC #46672 – 22/23, for As-Needed Set-Up/Installation & Break-Down of Barricades, Fences, & Traffic Safety Equipment. We will try to accommodate your schedule.  
>  
>  
>  
> Thank you,  
>



> Lynn  
>  
> \_\_\_\_\_  
>  
> Lynn Khaw, CPPO, CPPB, C.P.M.  
>  
> Department's Personal Services Contract Coordinator  
>  
> Office of Contract Administration/Purchasing  
>  
> City and County of San Francisco  
>  
> (415) 554-6296 – Calls will be forwarded to mobile phone  
>  
> Email: [lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)  
>  
>  
> From: Theresa Foglio <[laborers261@gmail.com](mailto:laborers261@gmail.com)>  
> Sent: Wednesday, July 27, 2022 4:19 PM  
> To: Khaw, Lynn (ADM) <[lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)>  
> Subject: Re: Receipt of Notice for new PCS over \$100K PSC # 46672 -  
> 22/23  
>  
>  
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>  
> This message is from outside the City email system. Do not open links or attachments from untrusted sources.  
>  
>  
>  
>  
> Greetings,  
>  
> The Union requests to meet and confer over PSC 46672-22/23.  
>  
> Please advise,  
>  
>  
>  
> On Fri, Jul 22, 2022 at 4:23 PM <[lynn.khaw@sfgov.org](mailto:lynn.khaw@sfgov.org)> wrote:  
>  
> RECEIPT for Union Notification for PSC 46672 - 22/23 more than \$100k  
>  
> The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a  
> request for a Personal Services Contract (PSC) 46672 - 22/23 for  
> \$750,000 for Initial Request services for the period 10/18/2022 –  
> 10/17/2027. Notification of 30 days  
> (60  
> days for SEIU) is required.  
>  
> After logging into the system please select link below, view the  
> information and verify receipt:

>  
> <https://url.avanan.click/v2/> <http://apps.sfgov.org/dhrdrupal/node/18>  
> 951\_\_\_\_.YXAzOnNmZHqYOmE6bzo0MGZhMGMxMWU3MzY1NGViM2I4ZTA5ZTYyMjcyYmNhZDo  
> 2OjE4ZTY6ZTBiNzRiMGY3ZDcyOTEwMTIjMmJkZDA2OTEwMzZIOGE3OGewYTUzYzKxYWMzY  
> WQyNmU5MDQxM2NIZmQxMjliZjpwOIQ 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  
>  
>  
>  
>  
> --  
>  
> Be Well and Stay Safe!  
>  
>  
>  
> Theresa Foglio-Ramirez  
> Public Sector Business Agent  
> LiUNA!, Local 261  
> 3271 18th Street  
> San Francisco, CA 94110  
>  
> (415) 823-7566 cell  
> (415) 826-4550 office  
> (415) 826-1948 fax  
> <https://url.avanan.click/v2/> <http://twitter.com/theresafoglio> .YXA  
> zOnNmZHqYOmE6bzo0MGZhMGMxMWU3MzY1NGViM2I4ZTA5ZTYyMjcyYmNhZDo2OmIxnjQ6Y  
> TAxOWlwMWUxNTdjYTYyNDJkMjgxNTg3OWUwNmYzMjlkYzhOTM1MmM3NTc0NWMwY2JmNjA  
> zODQ2NzRiNzcyZTpwOIQ

--  
Be Well and Stay Safe!

Theresa Foglio-Ramirez  
Public Sector Business Agent  
LiUNA!, Local 261  
3271 18th Street  
San Francisco, CA 94110  
(415) 823-7566 cell  
(415) 826-4550 office  
(415) 826-1948 fax

<https://url.avanan.click/v2/> <http://twitter.com/theresafoglio> .YXAzOnNmZHqYOmE6bzo0MGZhMGMxMWU3MzY1NGViM2I4ZTA5ZTYyMjcyYmNhZDo2OmRhNzI6OTRiNDg3NGEyNmU5MmNkNTMwYjQ4OTAyYjBkYwQ3YWl4YjhjNjNjMwVhNjNmOWUwMDIjMDJjOWQ1ZTIjYzQxYzpwOIQ

--

Be Well and Stay Safe!

**Theresa Foglio-Ramirez**

Public Sector Business Agent

LiUNA!, Local 261

3271 18th Street

San Francisco, CA 94110

(415) 823-7566 cell

(415) 826-4550 office

(415) 826-1948 fax

<http://twitter.com/theresafoglio>

**From:** [Wayne, Maura \(DPW\)](#)  
**To:** [Cheng, Paul \(ADM\)](#)  
**Cc:** [Khaw, Lynn \(ADM\)](#)  
**Subject:** PSC for Set-up/Break-down of Barricades/Fencing/Traffic Safety Equip  
**Date:** Wednesday, September 21, 2022 11:38:20 AM

---

Hello Paul,

Per your request, we certify that we will not use contracting services on the Local 261 laborers' work of setting up barricades and safety signage for daily operations for small to mid-scale street/sewer paving and repairs. We will only contract out for safety control measures when working on large, special projects in heavily traffic areas or Muni right of way, special events that require fence installations and large amounts of barricades, and temporary shelter installations.

Thanks,  
Maura

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CITY PLANNING -- CPC

Dept. Code: CPC

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

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

Type of Service: As-Needed Pool of Environmental, Transportation review, Historical Resources, and Archaeology

Funding Source: Various grants and general funds

PSC Amount: \$9,500,000

PSC Est. Start Date: 06/27/2022

PSC Est. End Date  
06/28/2028

**1. Description of Work**

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

The San Francisco Planning Department seeks to develop a list of qualified contractors to provide a variety of as-needed consulting services, with a focus on advancing equity and shared prosperity for all residents.

The Planning Department is seeking to create four pools of qualified contractors ("Pool[s]"). Each Pool will have expertise in one (1) or more of the following areas:

- 1) Environmental (CEQA Services)
- 2) Transportation Review
- 3) Historical Resources
- 4) Archeology

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

The services are required to allow the City to access specialized skills to support existing Planning staff on specific, one-time projects. These projects may include environmental impact analyses (CEQA services), transportation analyses, historic resource analysis and mitigation (such as Historical Resource Evaluations (HRE) and preservation alternative memos, and archeological documents for environmental evaluation and mitigation phases, collectively referred to as "environmental analyses" in the RFQ for Planning Department. Denial would result in limiting the opportunities for growth and inefficient environmental planning.

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 sub-components of earlier PSC requests.

D. Will the contract(s) be renewed?

A firm may be awarded more than one contract and/or renewal within the RFQ term.

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

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

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

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

- B. Explain the qualifying circumstances:

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

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

- A. Specify required skills and/or expertise: 1. Environmental (CEQA) services, preparation of EIRs and many complex Mitigated Negative Declarations in San Francisco, assemble and manage expertise for range of environmental topics, application of recent CEQA guidelines. 2. Transportation Review, including performing transportation impact analyses in support of the overall environmental and development review process. Transportation review consultant services include conducting technical assistance regarding integration of land use modelling and multimodal transportation planning and policy; emerging transportation technologies and methodologies to analyze effect on transportation conditions in an urban environment and/or impacts to various modes of transportation. 3. Historical Resource services, including assessment of potential impacts to historic resources, assist in the development of preservation alternatives, provide mitigation measures to reduce impacts where identified and applicable. Historical Resources consultants are required to apply the Secretary of the Interior’s Standards for the Treatment of Historic Properties as well as the ability to evaluate eligibility for the California Register of Historical Resources. 4. Archeology, including preparation of complex archeological documents in support of environmental project analyses, complex archeological field investigations and documentation in compliance with environmental mitigation programs. Archeological consultants must satisfy the Secretary of the Interior (“SOI”) Professional Qualification Standards for Archaeology and the SOI Professional Qualification Standards for prehistoric archeology and historical archeology. Archeological consultants must also be RPA-certified (Register of Professional Archaeologist-certified).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5275, Planner Technician; 5277, Planner 1; 5278, Planner 2; 5283, Planner 5; 5291, Planner 3; 5293, Planner 4; 5502, Project Manager 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractor's staff would perform the requested services at their company offices, with the possibility of some on-sie review of the development or plan area.

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

The SF Admin Code Chapter 31 designates Planning Department as lead agency under jurisdiction of SF departments for purposes of CEQA. Due to the essential purposes of CEQA, numerous projects have come to light which requires diverse, short term consulting on an as-needed periodic basis. Current staff capacity does not provide for full time staff with these specialized skills.

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

- A. Explain why civil service classes are not applicable.  
Civil Services classes are not applicable for one-time projects.
  
- 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. Due to various combinations of impact knowledge and expertise required for each project or plan, it would not be practical to create various classifications, that may be called on to provide services for only a fraction of any project for a limited duration.

**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, other than the traditional training and education, various combinations of knowledge and expertise is required for each project or plan. Subject matter expertise vary greatly, depending on project scopes.
  
- 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 09/20/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Management & Superv Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP

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

Name: Shirley Hao Phone: 628-652-7517 Email: shirley.hao@sfgov.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 43920 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022



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

**From:** [dhrrpscordinator@sfgov.org](mailto:dhrrpscordinator@sfgov.org) on behalf of [shirley.hao@sfgov.org](mailto:shirley.hao@sfgov.org)  
**To:** [Hao, Shirley \(CPC\); Laxamana, Junko \(DBI\); amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; l21pscreview@ifpte21.org; Hao, Shirley \(CPC\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Hao, Shirley (CPC); Laxamana, Junko (DBI); amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; l21pscreview@ifpte21.org; Hao, Shirley (CPC); DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 43920 - 22/23  
**Date:** Tuesday, September 20, 2022 10:38:52 AM

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RECEIPT for Union Notification for PSC 43920 - 22/23 more than \$100k

The CITY PLANNING -- CPC has submitted a request for a Personal Services Contract (PSC) 43920 - 22/23 for \$9,500,000 for Initial Request services for the period 06/27/2022 – 06/28/2028. 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/19131> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR -- MYR

Dept. Code: MYR

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

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

Type of Service: Financial and Technical Consulting Services

Funding Source: General Funds, Grants, Special Revenue Fund PSC Duration: 4 years 1 day

PSC Amount: \$2,500,000

**1. Description of Work**

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

The Mayor's Office of Housing and Community Development (MOHCD) is seeking to establish a pool of qualified consultants and financial advisors to advise the City on all pertinent issues relating to particular financings, to ensure that the City's transactions meet all applicable standards of competence and fiscal prudence, to structure and update existing programs, assist in advocacy and application for funds and other resources, all while adhering to program requirements and affordable housing objectives. The consultants and financial advisors will; provide advisory services to competitive sales, negotiated sales, private placements, and management of housing assets and/or bond types (tax bond, revenue bonds, etc.), provide financial advisory services to structuring the City's affordable housing programs; provide advisory services for structuring of particularly complex development proposal; provide advisory services for commercial space financing and asset management in affordable housing; assist in applications for state and federal resources; provide policy expertise on structuring new programs and updating existing programs; and to provide advice on advocacy and regulatory changes to housing programs.

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

These services are necessary in order to structure complex financial transactions and prepare the City to issue debt to finance acquisition, construction and/or rehabilitation of housing sites. Without proper guidance from an experienced consultant, the City would not be able to complete this task.

**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.**

Comparable financial advisory services were provided in the past by California Housing Partnership Corp, Street Level Advisors, and Ross Financial under approved PSC 40634-15/16.

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

Contract renewal will be based on a system needs review during the final contract year.

**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:

They are that it is intermittently needed and that the work is highly specialized and employees with that specialization (including support from their organizations) is not a resource the City has

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

A. Specify required skills and/or expertise: A qualified consultant must have, complex housing financing and/or management experience including the ability to evaluate the economic feasibility of proposed debt issuances, refunding, or restructuring; experience with housing assistance programs including the ability to assist the City in utilizing available City programs; development of new programs and to provide analytical services to particular financings; and the ability to structure complex multiple funding transactions. Alternatively, for policy and program consulting the consultant must have an in-depth knowledge of technical application processes for state and local programs as well as of the best practices for various types of housing programs.

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?**

In order to perform these services, you will require a qualified consultant who must have, complex housing financing and/or management experience including the ability to evaluate the economic feasibility of proposed debt issuances, refunding, or restructuring; experience with housing assistance programs including the ability to assist the City in utilizing available City programs; development of new programs and to provide analytical services to particular financings; and the ability to structure complex multiple funding transactions. Alternatively, for policy and program consulting the consultant must have an in-depth knowledge of technical application processes for state and local programs as well as of the best practices for various types of housing programs.

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

A. Explain why civil service classes are not applicable.

The tasks are intermittent and subject to funding fluctuations. Additionally, some of the consults and financial advisors would be a project expense and as such would be paid through the budgets of individual projects.

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 of the intermittent nature of the task and the likelihood that there will be time periods when services from financial advisor are not needed.

### **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 to 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 08/23/2022, 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: Karen Henderson Phone: 701-5557 Email: karen.henderson@sfgov.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46236 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

## Henderson, Karen (MYR)

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**From:** dhr-psccordinator@sfgov.org on behalf of karen.henderson@sfgov.org  
**Sent:** Tuesday, August 23, 2022 11:36 AM  
**To:** Henderson, Karen (MYR); max.porter@seiu1021.org; 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 (DBI); 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; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Meyers, Julie (HSA); Stan Eichenberger; Jason Klumb; 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; Basconciello, 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; Henderson, Karen (MYR); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 46236 - 22/23

RECEIPT for Union Notification for PSC 46236 - 22/23 more than \$100k

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

46236 - 22/23 for \$2,500,000 for Initial Request services for the period 09/01/2022 – 09/01/2026. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19056> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR

Dept. Code: MYR

Type of Request:  Initial  Modification of an existing PSC (PSC # 40634 - 15/16)

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

Type of Service: Financial Advising Services

Funding Source: General Fund, Grants, Bonds

PSC Original Approved Amount: \$1,500,000 PSC Original Approved Duration: 06/01/15 - 05/25/20 (4 years 51 weeks)

PSC Mod#1 Amount: \$750,000 PSC Mod#1 Duration: 05/25/20-11/25/22 (2 years 26 weeks)

PSC Cumulative Amount Proposed: \$2,250,000 PSC Cumulative Duration Proposed: 7 years 25 weeks

**1. Description of Work**

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

The Mayor's Office of Housing and Community Development (MOHCD) is seeking to establish a pool of qualified financial advisors to advise the City on all pertinent issues relating to particular financings and ensure that the City's transactions meet all applicable standards of competence and fiscal prudence, while adhering to program requirements and affordable housing objectives. The financial advisors will; provide advisory services to competitive sales, negotiated sales, private placements, and management of housing assets and/or bond types (tax bond, revenue bonds, etc.), provide financial advisory services to structuring the City's affordable housing programs; and provide advisory services for structuring of particularly complex development proposals.

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

These services are necessary in order to structure complex financial transactions and prepare the City to issue debt to finance acquisition, construction and/or rehabilitation of housing sites. Without proper guidance from an experienced consultant, the City would not be able to complete this task.

**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 40634 - 15/16

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

Not yet determined

**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:**

None

**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).

**Explain the qualifying circumstances:**

These services are very specialized and transactional as such it will not be practical to build internal capacity. The tasks are intermittent and subject to funding fluctuations, because of the intermittent nature of the tasks and the likelihood that there will be time periods when services from financial advisor are not needed.

**B. Reason for the request for modification:**

Requesting modification to extend the existing end date and increase the PSC amount.

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

- A. Specify required skills and/or expertise: A qualified consultant must have, complex housing financing and/or management experience including the ability to evaluate the economic feasibility of proposed debt issuances, refunding, or restructuring; experience with housing assistance programs including the ability to assist the City in utilizing available City programs; development of new programs and to provide analytical services to particular financings; and the ability to structure complex multiple funding transactions.
- 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.  
The tasks are intermittent and subject to funding fluctuations. Additionally, some of the financial advisors would be a project expense and as such would be paid through the budgets of individual projects.
- 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 of the intermittent nature of the task and the likelihood that there will be time periods when services from financial advisor are not needed.

**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 tasks are transactional and does not need further work after services are provided.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification: On 01/27/20, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified**

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

Name: Karen Henderson Phone: 701-5557 Email: karen.henderson@sfgov.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40634 - 15/16

DHR Analysis/Recommendation:  
Commission Approval Required  
03/02/2020 DHR Approved for 03/02/2020

03/02/2020  
Approved by Civil Service Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Harris Technical Support

Funding Source: Operating Funds

PSC Duration: 2 years 1 day

PSC Amount: \$500,000

**1. Description of Work**

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

Project Management Activities:

- coordinate activities with L3Harris tech to perform on-site maintenance, troubleshooting, etc.
- ensure proper updates are communicated to San Francisco Municipal Transportation Agency (SFMTA) (issue, cause, resolution)
- conduct ad-hoc meetings as necessary, take meeting notes, send out updates
- track actions/issues list and provide updates when required
- prepare quarterly invoice packages for SFMTA
- assist in coordinating additional resources when required (Patriot, Conduent, additional L3Harris staff)
- assist in RMA (Remote Network Management) coordination and ensure timely delivery of materials back to SFMTA

Systems Engineering Activities:

- Review of various network management systems in response to emails describing system events and notification of possible system problems.
- Regular review of the tunnel system using Intermapper, the radio system using the remote network management and system center operations manager review of network devices using CiscoPrime, and review of Conduent servers using WhatsUpGold. Report any issues that have been discovered.
- Correction of problems when a remote solution is possible - e.g. remote reboot of a base station

the device, configuration reloads on a tunnel Lantronix module when it is reporting "no SNMP response"

-Periodic review (via browser) Alarm Point Duplicator (APO) status, Duracomm control center, Netclocks,

and power systems (rectifiers and inverters). Report any issues that have been discovered

-Support for Harris personnel: primarily Brian Gonsalves, Robyn Ferguson, and Tom Brown

-Support for SFMTA personnel: Roi Kingon and Jacky So

-Support for Conduent - generally with respect to configuration changes to WhatsUpGold.

-System configuration changes as required. Historically that has included system database changes

(in the user access system, Maestro console layout configuration, managing user accounts and access as

required.

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

This service is required as part of ongoing system maintenance post-project implementation. It enhances SFMTA's maintenance by providing proactive monitoring and reporting of issues. When an incident is underway, priority access to a systems engineer ensures that root causes can be identified, and issues resolved in a timely manner. This maintenance service is proprietary and without it, we cannot access the system and acquire the necessary information to identify the cause of error or failure. Denying this request means without proactive monitoring that failures will occur more often and when failures occur, they will take longer to resolve without priority access to Harris resources.

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 through capital project implementation. The capital project has been completed and is now transitioning to operational maintenance support.

D. Will the contract(s) be renewed?

No

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

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

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

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

B. Explain the qualifying circumstances:

This service is needed temporarily until there is a long-term support contract in place with the vendor.

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

A. Specify required skills and/or expertise: Access to Harris, Inc proprietary radio communications and network technology.

B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 5504, Project Manager 2;

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 possible this is proprietary technology.

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

A. Explain why civil service classes are not applicable.  
Vendor proprietary technology.

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

**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. This vendor-proprietary technology cannot be transferred to the City employee.

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 09/29/2022, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S. Van Ness, 6th Floor San Francisco, Ca 94103

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45050 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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



## Nuque, Amy

---

**From:** dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com  
**Sent:** Thursday, September 29, 2022 11:03 PM  
**To:** Nuque, Amy; junko.laxamana@sfgov.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; dhr-psccordinator@sfgov.org  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 45050 - 22/23

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

RECEIPT for Union Notification for PSC 45050 - 22/23 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 45050 - 22/23 for \$500,000 for Initial Request services for the period 10/17/2022 – 10/17/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrDrupal/node/19235> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Penta System Services for Central Subway.

Funding Source: Federal and Local

PSC Duration: 2 years

PSC Amount: \$.500,000

**1. Description of Work**

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

Execute Central Subway unit/integration test and Market Street regression test for subway sign system changes related to Central Subway. Penta travels on-site for two weeks for two engineers to support test execution for both Market and Central Subway. Penta remote analysis of test results.

Software development to address bug fixes and mitigation of issues with Thales Automated Train Control System data feed for Central Subway. Software installation and cut-over support for any required updates.

Design and software development to support changes to transit service in Central Subway including new shuttle lines and enhanced passenger information at Chinatown station.

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

This work is required to complete the integration and test of the Central Subway and to modify the system to support new shuttle lines and enhancements to passenger information at Chinatown Station. Denial of this service will cause incorrect passenger information to be displayed.

**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 in the past by Penta Corporation as a subcontractor to a general construction contractor, Blocka Corporation. Blocka Corporation was responsible for the delivery of an integrated subway sign, including hardware and software, in 2017. Penta Corporation was a subcontractor to Blocka Corporation at that time. At that time, since the software development work was subcontracted to a construction contractor, approval by the Civil Service Commission was not relevant. Since then, services were provided under PSC 31195 21/22 .

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

No

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

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

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

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

B. Explain the qualifying circumstances:

This is a short-term project to enable the opening of Central Subway for passenger revenue service and to accommodate changes to operations.

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

A. Specify required skills and/or expertise: Specialty programming of a vendor's sole source technology and intellectual property.

B. Which, if any, civil service class(es) normally perform(s) this work? 1043, IS Engineer-Senior; 1044, IS Engineer-Principal;

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. No city resources can modify the vendor's intellectual property.

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

A. Explain why civil service classes are not applicable.  
No city resources can modify the vendor's intellectual property.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No city resources can modify the vendor's intellectual property.

**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. City engineers managing integration of several systems (including this one) will be providing training to SFMTA's transit operations impacted by this technology.

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 09/29/2022, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 48236 - 22/23

DHR Analysis/Recommendation:  
Commission Approval Required  
DHR Approved for 11/21/2022

Civil Service Commission Action:

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

## Nuque, Amy

---

**From:** dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com  
**Sent:** Thursday, September 29, 2022 10:16 PM  
**To:** Nuque, Amy; junko.laxamana@sfgov.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; dhr-psccordinator@sfgov.org  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 48236 - 22/23

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

RECEIPT for Union Notification for PSC 48236 - 22/23 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 48236 - 22/23 for \$500,000 for Initial Request services for the period 11/01/2022 – 10/31/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrDrupal/node/19233> 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: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request:  Initial  Modification of an existing PSC (PSC # 31195 - 21/22)

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

Type of Service: Software Devs Svcs from the vendor that provided the software of our subway station sign sys

Funding Source: Federal Funds

PSC Original Approved Amount: \$99,000 PSC Original Approved Duration: 02/01/22 - 02/01/23 (1 year)

PSC Mod#1 Amount: \$13,310 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$112,310 PSC Cumulative Duration Proposed: 1 year

**1. Description of Work**

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

Modification to proprietary software delivered by Penta Corporation in 2017. This software update is required to updated the subway station sign system to support new operational scenarios for Central Subway.

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

These modifications are required by SFMTA management in order to place Central subway into passenger revenue service . Denial of this service will cause incorrect passenger information to be displayed.

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 31195 - 21/22

D. Will the contract(s) be renewed?

No

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

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

A. Display all that apply

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

Explain the qualifying circumstances:

This is a short term project to implement a software update to enable the opening of Central Subway for passenger revenue service. Once Central Subway is opened the scope of the task will be completed. A new PSC will be submitted if additional work is required from Penta Corporation.

B. Reason for the request for modification:

Increase to amount to align with the proposal.

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



- A. Specify required skills and/or expertise: Specialty programming of a vendor's sole source technology and intellectual property.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1043, IS Engineer-Senior; 1044, IS Engineer-Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
No

**4. If applicable, what efforts has the department made to obtain these services through available resources within the City?**  
Not Applicable

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

- A. Explain why civil service classes are not applicable.  
No city resources can modify the vendor's intellectual property.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No city resources can modify the vendor's intellectual property.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No training as it is specialty programming of a vendor's sole source technology and intellectual property.
- 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. Specialty programming of a vendor's
- 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 07/21/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 31195 - 21/22

DHR Analysis/Recommendation:

08/15/2022

Commission Approval Required

Approved by Civil Service Commission

08/15/2022 DHR Approved for 08/15/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Professional Services

Funding Source: Local Funds

PSC Duration: 4 years

PSC Amount: \$3,000,000

**1. Description of Work**

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

1. Intelligent Transportation Systems Project Support
2. IT Network Infrastructure Support
3. Data and Analytics Infrastructure Support
4. SharePoint Administration and Migration Support
5. Java / Middleware Engineer Support
6. Salesforce Development and Administration Support

(see attached attached description)

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

As-needed Technology Consulting services to provide specialized support to the technology operations and projects by the division. Denial of this request will impact the delivery and operation efficiency of the section due to a lack of specialized technical skills or resource constraints.

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

This service was previously provided through an As-needed Technical Support contract, approved by PSC 49604 18-19

D. Will the contract(s) be renewed?

No

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

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

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

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

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

B. Explain the qualifying circumstances:

Human Resources (HR) Divisional rep function for Finance and Information Technology division has been recently reassigned to the Tech Biz Ops section. Tech Biz Ops is requesting as-needed support while we go through the budget process to add the required positions to support the recruitment of various positions within the division. We anticipate the consultant to provide short-term support until vacancies are filled.

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

A. Specify required skills and/or expertise: 1. Intelligent Transportation Systems Project Support 2. IT Network Infrastructure Support 3. Data and Analytics Infrastructure Support 4. SharePoint Administration and Migration Support 5. Java / Middleware Engineer Support 6. Salesforce Development and Administration

B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1070, IS Project Director; 5502, Project Manager 1; 5504, Project Manager 2; 5506, Project Manager 3;

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

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

The division will actively recruit positions to support functions that are long-term and utilize consultants on short-term assignments and temporary support.

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

A. Explain why civil service classes are not applicable.

A civil service class is applicable but we need to obtain an approved position and fill the vacancy.

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, we can utilize the existing civil service class.

**6. Additional Information**

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

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. 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 09/29/2022, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49342 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

## Nuque, Amy

---

**From:** dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com  
**Sent:** Thursday, September 29, 2022 11:49 PM  
**To:** Nuque, Amy; junko.laxamana@sfgov.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; dhr-psccordinator@sfgov.org  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 49342 - 22/23

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

RECEIPT for Union Notification for PSC 49342 - 22/23 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 49342 - 22/23 for \$3,000,000 for Initial Request services for the period 11/01/2022 – 10/31/2026. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrDrupal/node/19236> 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)**



## **PSC PART 2A- DESCRIPTION OF WORK**

A. Concise description of proposed work. If request for proposal (RFP) is available, please attach:

As-needed Technology Consulting services utilizing California GSA TDDC MSA to support the Technology section's needs in various service categories as follows:

### 1. Intelligent Transportation Systems Project Support -

- Providing project management services focused on technical aspects of ITS projects (i.e., no budgetary oversight).
- Developing and maintaining project management plans, including system-engineering management plans (SEMPs), that provide details for technical implementation, system integration, and quality controls.
- Reviewing the SFMTA's existing ITS service architecture to ensure compliance with the project's technical requirements, and compliance with applicable system-engineering standards and best practices.
- Conducting detailed reviews of existing or proposed ITS designs, including reviews of hardware and software functionality, performance, data, and design-limitation requirements. Developing and presenting to the SFMTA written recommendations for proposed design approaches, including descriptions of any technical and cost efficiencies related to those approaches. Incorporating SFMTA-approved recommendations into the system design documents.
- Developing system integration and interface control documents for new ITS projects.
- Developing system-integration acceptance test plans and procedures.
- Participating in system verification and validation activities, including supporting field testing and system acceptance tests, troubleshooting issues, and analyzing and documenting the results.
- Integrating existing ITS interfaces with new systems.
- Providing engineering and testing support for implementation of new ITS projects, including reviewing and responding to submittals and requests for information, preparing and reviewing change orders, and providing technical support.
- Overseeing, tracking, and documenting changes in SFMTA-approved designs and requirements of the field environments.
- Verifying and documenting that SFMTA contractors perform operations, measurements, and inspections in accordance with applicable contract requirements. For example, review operational manuals and as-built drawing submittals.
- Overseeing the installation of new software and hardware updates.
- Working with project team to define and update the requirements verification traceability matrix (RVTM).
- Designing, developing, and implementing data integration opportunities.
- Participating in comprehensive system and performance testing and safety certifications.
- Overseeing the installation of systems to ensure compliance with specifications, standards, codes, regulations, and documentation requirements.
- Working with project team to review and prepare cutover plan and implement cutover procedures for transitions to new systems.
- Reviewing and assist SFMTA contractors to develop technical training material.
- Participating in system performance evaluation and auditing.
- Writing ETL (extract, transform, and load) logic to automate data collection and reporting processes/pipelines including data quality and monitoring.
- Providing system engineering support including communications systems analysis, special engineering of GPS driven systems, strategic analysis of Muni's human and automated systems, systems integration, safety processes, configuration management, and related work as requested by the SFMTA.

### 2. IT Network Infrastructure Support

- Conducting analysis of existing IT network architecture and recommending solutions to optimize performance, and assisting with the implementation of recommendations.
- Working with SFMTA staff to establish a networking environment. For example, installing, configuring, testing, and documenting the equipment/network systems according to the design and specifications.
- Working collaboratively with SFMTA staff to assist with day-to-day networking tasks to ensure network reliability, availability, and serviceability within minimal interruption.
- Providing technical support, analysis, and solutions to reported IT network problems.
- Working with SFMTA staff to configure firewall security settings to access-permissions groups for individuals, and setting up provisions for incoming data.

- Supporting IT network upgrade or expansion projects. For example, installing hardware or software, and performing integration testing.
  - Producing documentation for installation, network topology, and troubleshooting of communications hardware or software.
  - Testing and designing solutions to ensure the IT network is secure with vulnerability management built in.
  - Supporting existing configuration of the IT network, and developing new solutions that leverage networking protocols, including OSPF, BGP, HSRP, multicast, SIP, QoS, VLANs, and MPLS.
  - Analyzing, identifying, and troubleshooting radio frequency issues and working with SFMTA staff to manage the spectrum.
  - Installing and configuring wireless backhaul radios (e.g., Proxim, Siklu, Radwin) when needed.
3. Data and Analytics Infrastructure Support
- Working with SFMTA staff to understand, define, and, if necessary, refine business objectives.
  - Defining, refining, and documenting metrics to support key business objectives.
  - Identifying measures used to create metrics.
  - Creating and refining data and analytic models or schemas to support SFMTA’s general analytics including analysis and reporting.
  - Drafting specifications for APIs and other interfaces to support business objectives, metrics, and reporting and analysis needs.
  - Making recommendations for data transformations including quality control and validation requirements.
  - Documenting business workflows.
  - Creating reports and dashboards.
  - Building pipelines to extract, ingest, process, and load data as batch and real-time operations.
  - Implementing data and analytic models or schemas.
  - Ensuring ingested and processed data are associated with quality codes.
  - Implementing monitoring and alerting processes.
  - Creating pipelines utilizing distributed technologies for storage and processing (especially Kudu, HDFS, Spark, and Azure technologies)
  - Implementing processes for replication and high availability.
  - Implementing processes for managing sensitive datasets.
4. SharePoint Administration and Migration Support
- Providing backend administration and support for the SFMTA’s SharePoint applications.
  - Maintaining SharePoint firewalls and security.
  - Managing SharePoint migration from initial installation to maintenance, and customizing design as necessary.
  - Working with SFMTA staff and consultants to customize SharePoint applications.
  - Troubleshooting and solving operational problems for assigned software or hardware technologies.
5. Java / Middleware Engineer Support
- Developing data integrations and APIs to ingest and share data to external business partners and the public.
  - Performing data validation, API development, and creating methods to receive and post data.
  - Managing and assisting to deploy ESB infrastructure, including writing and editing ansible deployment scripts.
  - Developing standard operating procedures to secure web services based on industry best practices.
  - Turning on API logging and creating reports to measure the availability of the web services.
6. Salesforce Development and Administration Support
- Developing data integrations and APIs to ingest and share data to external business partners and the public.
  - Performing data validation, API development, and creating methods to receive and post data.
  - Managing and assisting to deploy ESB infrastructure, including writing and editing ansible deployment scripts.
  - Developing standard operating procedures to secure web services based on industry best practices.
  - Turning on API logging and creating reports to measure the availability of the web services.

## **EXHIBIT A – MSA STATEMENT OF WORK**

### **1. INTRODUCTION**

The Department of General Services (DGS), Procurement Division (PD), hereinafter referred to as “DGS-PD” is contracting for Technology, Digital and Data Consulting services to be used by State and Local Governmental Agencies. A Local Governmental Agency is any city, county, city and county, district, or other local governmental body or corporation, including California State Universities (CSU) and University of California (UC) systems, K-12 schools and community colleges empowered to expend public funds, hereinafter collectively, with State Agencies, referred to as “User Agencies”. The term “User Agencies” used in conjunction with “must”, “shall” or “will” indicates a condition applicable to State Agencies and Local Governmental Agencies, unless otherwise specified.

### **2. SCOPE**

Contractor agrees to provide Technology, Digital and Data Consulting services to User Agencies in accordance with the terms and conditions of this Agreement. Prior to rendering services, Contractor and User Agency must execute an Agreement that incorporates all of the terms of this Master Service Agreement (“MSA” or “Agreement”) by reference and may contain additional specific terms and conditions, none of which may alter, rescind, or be in conflict with the terms and conditions of this MSA. For California State Agencies such participating Agreement shall be in the form of the Standard Agreement, Std. 213; and for Local Governmental Agency, the Agreement shall be in a form as specified by the Local Governmental Agency and the Contractor. The duly executed Std. 213 and appropriate form for Local Governmental Agency are herein referred to as the “User Agreement”.

### **3. AGREEMENT TERM**

- a. The term of this MSA is for three (3) years, with two (2) optional two (2) year extensions (upon mutual agreement of contractor and State) for a maximum cumulative term of seven (7) years, with the start and end date noted on the attached Std. 213 (the “Effective” term). Extensions will be made by amendment (Std. 213A) to the MSA at the same terms and conditions. All rates shall be firm fixed for the MSA term, including any optional year extensions.
- b. Should the Contractor fail to commence work at the agreed upon time, DGS-PD, upon five (5) days written notice to the Contractor, reserves the right to terminate the MSA.
- c. Should the Contractor fail to commence work at the agreed upon time, User Agency, upon five (5) days written notice to the Contractor, reserves the right to terminate the User Agreement. In addition, the Contractor shall be liable to User Agency for the actual cost of engaging another Contractor to perform the work.
- d. In addition to any other provision of the MSA, DGS-PD may terminate the MSA or cancel a portion of the service for any reason with thirty (30) days written notice. User Agency may terminate the User Agreement or cancel a portion of the service for any reason with thirty (30) days written notice.
- e. Contractor agrees to honor all User Agreements made prior to MSA expiration or termination at the same rates, terms and conditions. All User Agreements issued

State of California, Department of General Services  
**Technology, Digital and Data Consulting Master Service Agreement**

against this MSA must be fulfilled/completed in its entirety within five (5) years following the MSA End Date.

- f. In the event of a discrepancy and/or inconsistency, the descending order displayed on the Std. 213 shall take precedence.

**4. CONTRACT ADMINISTRATION**

- a. The Contractor shall provide the DGS-PD State Contract Administrator the name, address, telephone number and e-mail address of its Contract Manager directly responsible for managing this Agreement. Should the Contractor's Contract Manager change or any of its contact information change, the Contractor shall provide the DGS-PD State Contract Administrator updated information no later than ten (10) business days after the date of such change. The Contractor is responsible for notifying all contracting User Agencies in writing of any changes to a contact person, address, telephone numbers, or any other information deemed important to the functionality of the MSA.
- b. The DGS-PD State Contract Administrator will be identified in the MSA User Instructions.

**5. CONTRACTOR SELECTION PROCESS**

- a. Use of this MSA by User Agencies is non-mandatory and is subject to Government Code section 19130 et. seq. governing standards for the use of personal services contracts for State Agencies.
- b. Services procured under this MSA, will be requested from a list of MSA Contractors awarded by Category as described below.
- c. User Agencies will issue a Request for Offer (RFO) in the Tier value where services are required. User Agencies may specify one (1) or more of the forty-two (42) Classifications in the RFO. The RFO should include a SOW that contains specific details including but not limited to:
  - i. User Agency contact information.
  - ii. Requested date(s) of service (if known).
  - iii. Necessary services.
  - iv. Special requirements.
  - v. SB/DVBE.
- d. Contractors must acknowledge and respond to a written User Agency RFO within the timeframe specified by the User Agency.
- e. Contractors must respond to the User Agency's RFO, which may require resumes, staffing plans, a Fixed Price Per Deliverable (FP/D) response and/or other information as specified by the User Agency.
- f. A Fixed Price Per Deliverable (FP/D) approach is where fixed pricing is requested for a defined project, task, or set of tasks, and delivered per a specific schedule. When using FP/D approach the User Agency's SOW must describe in detail the particular project and the work that the selected qualified Contractor will be required to perform. User Agencies evaluate RFO responses and make the final selection of the Contractor.
- g. User Agencies shall not request services from Contractors for Tiers and Classifications not awarded.

- h. Pricing offered by the Contractor shall not exceed the rates specified in Exhibit B.1 - Rate Sheet.
- i. Protest provisions do not apply at the RFO level.

**6. USER AGENCY ADDITIONAL PROVISIONS AND/OR SPECIAL TERMS AND CONDITIONS**

Prior to developing the RFO, User Agencies must read the user instructions for any special instructions, including but not limited to SB/DVBE. User Agency may include additional terms and conditions including but not limited to Federal Debarment, Suspension, Ineligibility and Voluntary Exclusion Certification; insurance requirements such as Workers' Compensation and Employer's Liability, and Professional Liability; Confidentiality of Data; SB/DVBE criteria; Consulting Services Contract Approval in accordance to PCC 10371; Performance Bond; ownership of proprietary property and ownership of work product and rights.

**7. ORDER LIMITS/DOLLAR THRESHOLDS**

- a. State Ordering Agencies may execute orders, including amendments, up to the maximum order limit listed on page 1 of their Purchasing Authority Approval Letter (PAAL), unless otherwise specified by their approved delegated purchasing authority. Each State Agency's purchasing authority is listed by acquisition method and type on their PAAL.
- b. This order limit does not apply to local agencies.
- c. Violation of Public Contract Code (PCC) Section 10329 Against Split Orders:
  - i. If a contractor is found to have participated in a split order transaction for the purpose of circumventing a User Agency's approved purchasing authority dollar thresholds, the contractor's individual MSA may be suspended and/or terminated.
  - ii. If a User Agency is found to have participated in a split order transaction for the purpose of circumventing its approved purchasing authority dollar thresholds, the User Agency's purchasing authority may be suspended and/or revoked.

**8. CONTRACT ACTIVITY AND REPORTS**

- a. Each quarter, the Contractor shall submit a Quarterly Usage Report to the DGS-PD State Contract Administrator via email or other delivery method as specified by DGS-PD. The report shall summarize the Contractor's MSA contract activity for each User Agency, and it shall be provided to the DGS-PD State Contract Administrator by the fifteenth (15th) working day following the ending of the quarter's reporting period for which a User Agreement was executed. A report is required every quarter, even if the Contractor did not acquire a User Agreement during the reporting period.
- b. The Quarterly Usage Report will separate State contracting activities from that of local governmental entities. User Agreement issued against this MSA must contain at a minimum the following information:
  - 1) Contractor's MSA Number
  - 2) User Agency Name (department, agency, etc.)
  - 3) User Agreement Number
  - 4) User Agency Contact Person
  - 5) Classifications

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- 6) Rate(s)
- c. The DGS-PD State Contract Administrator reserves the right to modify this Quarterly Usage Report and require Contractor to provide additional reporting information during the course of the MSA.
- d. As applicable, Contractor will report subcontracting for Certified Small Business (SB) and Disabled Veteran Business Enterprise (DVBE).

**9. SB/DVBE SUBCONTRACTING**

Contractors who commit to subcontracting a percentage to Small Businesses/Disable Veteran Business Enterprises (SB/DVBE) shall do so for the entire term of the MSA. User Agencies will determine the use of socioeconomic programs at the RFO level to meet their departmental goals and determine commercially useful function (CUF). Changing of SB/DVBEs subcontractors may be subject to User Agency approval. Failure to maintain SB/DVBE subcontracting percentages may result in termination of the MSA.

The provisions for payment under the User Agreement may be subject to a ten thousand dollars (\$10,000) withhold in accordance with Military and Veterans Code sections 999.5 and 999.7.

**10. LOCAL GOVERNMENT AGENCY INCENTIVE FEE**

- a. For all local government agency transactions issued against the awarded MSA, the Contractor is required to remit DGS-PD an incentive fee of an amount equal to one point twenty-five (1.25) percent of the total contract amount (e.g. If the net Local Governmental Agency sales for a quarter is one million dollars (\$100,000.00), the incentive fee due to DG/PD is one-thousand two-hundred, fifty dollars (\$1,250.00).).
- b. This incentive fee shall not be included in the User Agency's purchase price, nor invoiced separately to the User Agency. All prices quoted to a local governmental agency shall reflect MSA contract pricing, including any and all applicable discounts, and shall not include add-on fees.
- c. Contractor payment of the local agency incentive fee to DGS-PD is due irrespective of whether or not the Local Governmental Agency has paid the Contractor for services.
- d. Contractor payment may be made in the form of an electronic payment using PD EPAY or by submitting a check payable to the State of California, Department of General Services. Along with each payment, a Contract Usage Report, filtered in Excel to include only local government agency sales, shall be submitted to the State Contract Administrator.
- e. To submit Incentive Fees through PD EPAY, users must register on the DGS/PD LPA Payment Portal (<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Access-LPA-Payment-Portal>).
- f. Incentive Fee payments made by check shall be submitted to the following address:  
Department of General Services  
MAPS Payments Processing  
707 3rd Street, 2nd Floor  
West Sacramento, CA 95605
- g. If a Contractor provided services for different Local Governmental agencies, the Contractor may submit one (1) check per month covering the DGS-PD incentive fee for

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the total of all Local Governmental Agency purchases. In this case, a separate report is still required for each contract and a list of the total Local Governmental Agency sales for each contract must be included with the check.

**11. POTENTIAL SUBCONTRACTORS**

Nothing contained in this Agreement or otherwise, shall create any contractual relation between the State and any Subcontractors, and no Subcontractor shall relieve the Contractor of its responsibilities and obligations hereunder. The Contractor agrees to be fully responsible to the State for the acts and omissions of its Subcontractors and of persons either directly or indirectly employed by any of the Subcontractors as it is for the acts and omissions of persons directly employed by the Contractor. The Contractor's obligation to pay its Subcontractors is an independent obligation from the State's obligation to make payments to the Contractor. As a result, the State shall have no obligation to pay or to enforce the payment of any moneys to any Subcontractor.

Contractor must ensure that the Subcontractor(s) will have all necessary licenses, permits, and/or certifications to accomplish its portion of the work. Failure of a Subcontractor(s) to have the proper licenses, permits, and/or certifications, may be cause for rejection of the Subcontractor and/or termination of the agreement. User Agencies may request an updated Bidder Declaration form with a User Agreement.

## **12. CLASSIFICATIONS**

Contractor agrees to provide the Classifications as identified Exhibit B.1 - Rate Sheet as follows:

### **1) Senior Project Manager**

The Senior Project Manager has full responsibility to manage and oversee all aspects of the most complex IT initiatives and work collaboratively with Product Managers to deliver IT products, services, or systems. This includes but is not limited to managing both external and internal IT project teams, and interacting with department heads, agency secretaries at the user agency, State control agencies, and individuals of similar status and capacity in the private sector.

The Senior Project Manager determines project scope, requirements, and deliverables for IT projects with clients or customers. They define, develop, modify, or provide input to project plans; they implement project plans to meet objectives; coordinate and integrate project activities; manage, lead or administer project resources; monitors project activities and resources to mitigate risk; implement or maintain quality assurance processes; make improvements, solve problems or takes corrective action when problems arise; gives presentations or briefings on all aspects of the project; participates in phase, milestone and final project reviews; identifies project documentation requirements or procedures; and develops and implements project schedules and release plans.

The Senior Project Manager; conducts analytical studies, feasibility studies, cost-benefit analyses; evaluates, monitors or ensures compliance with laws, regulations, policies, standards or procedures; identifies standards or requirements for change management; participates in change control (for example, reviewing change requests); implements information systems security plans and procedures; and ensures appropriate product-related training and documentation are developed and made available to customers. Senior Project Managers support Product Owners and Product Managers in product vision and roadmaps for projects that use agile or iterative methodologies.

The Senior Project Manager will possess knowledge and experience in customer service; decision making; flexibility; interpersonal skills; leadership; organizational awareness; problem solving, reasoning; team building; oral communication, speaking and writing; business process reengineering; capital planning and investment assessment; contracting/procurement; cost-benefit analysis; financial management; planning and evaluating; project management; quality assurance; requirements analysis and risk management; configuration, data, and information management; information resources strategy and planning; information technology architecture; information technology performance assessment; infrastructure design; systems integration; systems life cycle; and technology awareness.

#### Experience



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This Classification requires a minimum of seven (7) years of broad, extensive and increasingly responsible experience applying PM principles, methods, techniques, and tools. At least four (4) years of that experience must have been as a senior PM of one or more large or complex IT projects.

**And Education**

This classification requires the possession of (a) a bachelor's degree, and (b) a valid Project Management Professional (PMP) certification from the Project Management Institute (PMI), which will be verified during the Request for Offer (RFO) process.

Additional qualifying experience may be substituted for the required education on a year-for-year basis. The PMP certification is required and may not be substituted with additional experience.

**2) Project Manager**

The Project Manager usually works under the direction of a Senior Project Manager or user agency personnel and manages or oversees all aspects of one or more IT projects while interacting with mid-level officials of similar capacity at the user agency and private sector.

The Project Manager determines appropriate IT services with clients or customers to define project scope, requirements and deliverables; develops, modifies or provides input to project plans; implements project plans to meet objectives; coordinates and integrates project activities; manages, leads or administers project resources; monitors project activities and resources to mitigate risk; implements or maintains quality assurance processes; makes improvements, solves problems or takes corrective action when problems arise; gives presentations or briefings on all aspects of the project; participates in phase, milestone and final project reviews; identifies project documentation requirements or procedures; and develops and implements project schedules and release plans in coordination with product teams.

The Project Manager conducts analytical studies, feasibility studies, cost-benefit analyses; evaluates, monitors or ensures compliance with laws, regulations, policies, standards or procedures; identifies standards or requirements change management; participates in change control (for example, reviewing change requests); implements information systems security plans and procedures; and ensures appropriate product-related training and documentation are developed and made available to customers.

The Project Manager will possess knowledge and experience in customer service; decision making; flexibility; interpersonal skills; leadership; organizational awareness; problem solving, reasoning; team building; oral communication, speaking and writing; business process reengineering; capital planning and investment assessment; contracting/procurement; cost-benefit analysis; financial management; planning and evaluating; project management; quality assurance; requirements analysis and risk management; configuration, data, and information management; information resources strategy and planning; information technology architecture; information technology

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performance assessment; infrastructure design; systems integration; systems life cycle; and technology awareness.

Experience

This classification requires a minimum of five (5) years of broad, extensive and increasingly responsible Project Manager project experience applying project management principles, methods, techniques, and tools. At least three (3) years of that experience must have been in a lead capacity.

And Education

This classification requires the possession of (a) a bachelor's degree, and (b) a valid Project Management Professional (PMP) certification from the Project Management Institute (PMI), which will be verified during the RFO process.

Additional qualifying experience may be substituted for the required education on a year-for-year basis. The PMP certification is required and may not be substituted with additional experience.

**3) Senior Technical Lead**

A Senior Technical Lead ensures IT architectural integrity and functions as the interface between systems developers and IT project managers. The Senior Technical Lead provides coordination, oversight and leadership for the analyses, planning, design, implementation, documentation, assessment, and management of IT architecture and infrastructure design framework to align IT approaches with an organization's mission, goals and business processes.

The Senior Technical Lead will develop reference models of the enterprise and maintain the information in the IT repository; determine the gaps between the current and the target architecture and develop plans for transitioning to target architecture; define the policies and principles to guide technology decisions for the enterprise architecture; identify opportunities to improve enterprise-level systems to support business processes and utilize emerging technologies; promote and educate customers and stakeholders on the use and value of the enterprise architecture; provide enterprise architecture guidance, support and coordination to customers and IT project teams; document the enterprise architecture infrastructure, including the business units and key processes, using modeling techniques; ensure technical integration is achieved across the enterprise by participating in test planning, validation and reviews; evaluate the impact of enterprise architecture products and services on IT investments, business operations, stakeholder satisfaction and other outcomes; coordinate and conduct governance and portfolio management activities associated with ensuring compliance with the enterprise architecture; and ensure the rigorous application of information security/information assurance policies, principles and practices to all components of the enterprise architecture.

The Senior Technical Lead will possess knowledge and experience in organizational mission, IT infrastructure, enterprise architecture principles and reference models, and

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program management principles sufficient to participate in the development of organizational enterprise architecture goals, objectives, plans and policies; organizational enterprise architecture models, policies and planning formulation process, strategic and IT goals and objectives, and IT program metrics and measurement techniques sufficient to ensure enterprise-level IT specifications align with the organizational business requirements, identify potential improvements to enterprise architecture to meet organizational goals, and establish and implement metrics for evaluating the accomplishments of enterprise architecture goals and objectives; methods and approaches for sharing information through the use of IT assets, project management concepts, methods and practices, enterprise architecture concepts and principles, and multiple IT disciplines sufficient to develop major components of the enterprise architecture plan including strategic drivers, current and target architectures, the sequencing plan, architectural segments and reference models and standards; technical documentation methods; and speak and write effectively and prepare effective reports. Experience in architecture and implementation of the applications in the cloud, On-premises, and hybrid environments.

Experience

This Classification must have a minimum of eight (8) years of experience aligning IT systems with organizational business processes. At least five (5) years of that experience must have been in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**4) Technical Lead**

The description is the same as with the Senior Technical Lead, except this classification functions under general supervision of a Senior Technical Lead or Senior Project Manager.

The Technical Lead will develop reference models of the enterprise and maintain the information in the IT repository; determine the gaps between the current and the target architecture and develop plans for transitioning to target architecture; define the policies and principles to guide technology decisions for the enterprise architecture; identify opportunities to improve enterprise-level systems to support business processes and utilize emerging technologies; promote and educate customers and stakeholders on the use and value of the enterprise architecture; provide enterprise architecture guidance, support and coordination to customers and IT project teams; document the enterprise architecture infrastructure, including the business units and key processes, using modeling techniques; ensure technical integration is achieved across the enterprise by participating in test planning, validation and reviews; evaluate the impact of enterprise architecture products and services on IT investments, business operations, stakeholder satisfaction and other outcomes; coordinate and conduct governance and portfolio management activities associated with ensuring compliance with the enterprise architecture; and ensure the

rigorous application of information security/information assurance policies, principles and practices to all components of the enterprise architecture.

The Technical Lead will possess knowledge and experience in organizational mission, IT infrastructure, enterprise architecture principles and reference models, and program management principles sufficient to participate in the development of organizational enterprise architecture goals, objectives, plans and policies; organizational enterprise architecture models, policies and planning formulation process, strategic and IT goals and objectives, and IT program metrics and measurement techniques sufficient to ensure enterprise-level IT specifications align with the organizational business requirements, identify potential improvements to enterprise architecture to meet organizational goals, and establish and implement metrics for evaluating the accomplishments of enterprise architecture goals and objectives; methods and approaches for sharing information through the use of IT assets, project management concepts, methods and practices, enterprise architecture concepts and principles, and multiple IT disciplines sufficient to develop major components of the enterprise architecture plan including strategic drivers, current and target architectures, the sequencing plan, architectural segments and reference models and standards; technical documentation methods; and speak and write effectively and prepare effective reports.

Experience

This Classification must have a minimum of five (5) years of experience aligning IT systems with organizational business processes. At least three (3) years of that experience must have been in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**5) Business Solutions Analyst**

A Business Solutions Analyst performs business systems analysis and is responsible for work that involves applying analytical processes to the planning, design and implementation of new and improved business information systems and business processes to meet the business requirements of customer organizations.

The Business Solutions Analyst will perform needs analyses to define opportunities for new or improved business process solutions; conduct business process reengineering; conduct feasibility studies and trade-off analyses; perform as a liaison between internal and external customers; consult with customers to identify, refine and specify functional requirements, and translate functional requirements into technical specifications; develop overall functional and systems requirements and specifications; prepare business cases for the application of IT solutions; define systems scope and objectives; develop cost estimates for new modified systems; ensure the integration of all system components; e.g., policies, procedures, training material, databases, software and hardware; conduct performance and

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reliability testing of new solutions; plan and participate in systems implementation and provide post-implementation support and ensure the rigorous application of information security/information assurance policies, principles and practices to the systems analysis process.

The Business Solutions Analyst will possess knowledge and experience in structured analysis principles and methods; systems analysis and analytical principles, concepts, techniques and methods, including cost-benefit analysis methods; basic IT architecture and technical documentation methods; systems design tools, methods and techniques, including automated systems analysis and design tools sufficient to develop requirements and specifications for systems that meet business requirements; systems design standards, policies and authorized approaches sufficient to assist in identifying and specifying business requirements for new or enhanced systems and develop basic system specifications; system design precedents or alternative approaches sufficient to advise on the merits of proposed systems development projects; business processes, workflows and operations of customer organizations sufficient to apply a structured systems analysis approach to the design and development of new or enhanced applications; business process engineering concepts and methods sufficient to lead/conduct studies designed to identify potential improvements in the way IT is applied to key business functions; life cycle management concepts; internet and new IT technologies; and speak and write effectively and prepare effective reports.

Experience

This Classification must have a minimum of five (5) years of experience applying analytical processes on IT projects. At least three (3) years of that experience must have been in business systems analysis and design.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**6) Senior Software Engineer**

A Senior Software Engineer is responsible for leading and/or working on the most complex IT applications design, documentation, development, modification, testing, installation, implementation and support of new or existing applications software. This Classification may also plan, install, configure, test, implement and manage a systems environment in support of an organization's IT architecture and business needs. Common organizational or functional industry position titles for programmers include but are not limited to programmer analyst, applications developer, software engineer, software developer, software quality assurance specialist, systems programmer, systems software programmer, database administrators, computer systems analysts, systems engineer, systems software engineer.

The Senior Software Engineer, in development of applications software, is responsible for analyzing and refining systems requirements; translating systems requirements into applications prototypes; planning and designing systems architecture; writing, debugging

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and maintaining code; determining and designing applications architecture; determining output media/formats; designing user interfaces; working with customers to test applications; assuring software and systems quality and functionality; integrating hardware and software components; writing and maintaining program documentation; evaluating new applications software technologies; and/or ensuring the rigorous application of information security/information assurance policies, principles and practices to the delivery of application software services.

The Senior Software Engineer, in development of operating systems, is responsible for analyzing systems requirements in response to business requirements, risks and costs; evaluating, selecting, verifying and validating the systems software environment; evaluating, selecting and installing compilers, assemblers and utilities; integrating hardware and software components within the systems environment; monitoring and fine-tuning performance of the systems environment; evaluating new systems engineering technologies and their effect on the operating environment; and/or ensuring that information security/information assurance policies, principles and practices are an integral element of the operating environment.

The Senior Software Engineer will possess knowledge and experience in applications software development principles and methods sufficient to participate in the design, development, testing and implementation of new or modified applications software; operating systems installation and configuration procedures; organization's operational environment; software design principles, methods and approaches; principles, methods and procedures for designing, developing, optimizing and integrating new and/or reusable systems components; pertinent government regulations; infrastructure requirements, such as bandwidth and server sizing; database management principles and methodologies, including data structures, data modeling, data warehousing and transaction processing; functionality and operability of the current operating environment; systems engineering concepts and factors such as structured design, supportability, survivability, reliability, scalability and maintainability; optimization concepts and methods; establish and maintain cooperative working relationships with those contacted in the course of the work; and speak and write effectively and prepare effective reports.

Experience

This Classification must have a minimum of seven (7) years of experience in electronic data processing systems study, design, and programming. At least four (4) years of that experience must have been in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**7) Software Engineer**

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The description is the same as with the Senior Software Engineer, except this Classification functions under general supervision.

The Software Engineer, in development of applications software, is responsible for analyzing and refining systems requirements; translating systems requirements into applications prototypes; planning and designing systems architecture; writing, debugging and maintaining code; determining and designing applications architecture; determining output media/formats; designing user interfaces; working with customers to test applications; assuring software and systems quality and functionality; integrating hardware and software components; writing and maintaining program documentation; evaluating new applications software technologies; and/or ensuring the rigorous application of information security/information assurance policies, principles and practices to the delivery of application software services.

The Software Engineer, in development of operating systems, is responsible for analyzing systems requirements in response to business requirements, risks and costs; evaluating, selecting, verifying and validating the systems software environment; evaluating, selecting and installing compilers, assemblers and utilities; integrating hardware and software components within the systems environment; monitoring and fine-tuning performance of the systems environment; evaluating new systems engineering technologies and their effect on the operating environment; and/or ensuring that information security/information assurance policies, principles and practices are an integral element of the operating environment.

The Software Engineer will possess knowledge and experience in many of the following areas: applications software development principles and methods sufficient to participate in the design, development, testing and implementation of new or modified applications software; operating systems installation and configuration procedures; software design principles, methods and approaches; principles, methods and procedures for designing, developing, optimizing and integrating new and/or reusable systems components; pertinent government regulations; infrastructure requirements, such as bandwidth and server sizing; database management principles and methodologies, including data structures, data modeling, data warehousing and transaction processing; systems engineering concepts and factors such as structured design, supportability, survivability, reliability, scalability and maintainability; optimization concepts and methods; establish and maintain cooperative working relationships with those contacted in the course of the work; and speak and write effectively and prepare effective reports.

Experience

This Classification must have a minimum of five (5) years of experience in electronic data processing systems study, design, and programming. At least three (3) years of that experience must have been in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

## **8) Technical Writer**

A Technical Writer produces technical documentation that helps people understand and use a product or service. This documentation may include but not limited to online help, manuals (system, end-user, training, and instruction), white papers, design specifications, project plans, test plans, business correspondence, how-to-guides, etc. With the rise of e-learning, technical writers are also charged with creating online training for their audience of learners. Technical writers explain technologies, processes, and products in many formats, including print, online, and other electronic means.

The Technical Writer will work with internal teams to obtain an in-depth understanding of the product and the documentation requirements; analyze existing and potential documentation content; produce high-quality documentation that meets applicable standards and is appropriate for its intended audience; research, develop, write, edit and proofread complex technical documentation and supporting material for software, hardware, technical procedures, and computer related services; create, maintain and update manuals, procedures, specifications and other documents; create, assimilate, convey, maintain and update technical documents and policies and procedures in a concise and effective manner for a variety of audiences; review, revise, modify and edit documents prepared by others; provide writing, editing and design support to team members; create and maintain the information architecture; write easy-to-understand user interface text, online help and developer guides; create manuals and tutorials to help end-users use a variety of applications; and create, compile and deliver software development documentation packages.

The Technical Writer will possess knowledge and experience in message delivery and development; communications; attention to detail; collaboration; data gathering and analysis; planning and prioritization; leveraging technology; excellent clear and concise writing and grammar skills, work independently, deliver accurate documentation under deadline pressure; strong working knowledge of Microsoft Office; requirements analysis; Information Management skills; interview and listening skills; proven working experience in technical writing of software documentation; ability to quickly grasp complex technical concepts and make them easily understandable in text and visuals; reviews and studies blueprints, sketches, drawings, parts lists, specifications, mockups, and product samples to integrate and delineate technology, operating procedure, and production sequence and detail; familiarity of a variety of software programs for the purpose of writing text, creating charts and graphs, and incorporating diagrams and photos in documents; basic familiarity with the SDLC and software development; systems and business analysis and analytical principles, computer scripting, illustration/graphic design, information architecture and design, technical translation, training, e-learning, user interfaces, website design/management, hyper-text markup language (HTML), concepts, techniques and methods, including cost-benefit analysis methods; and knowledge of information technology, e.g. hardware and software.

### Experience



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This Classification must have a minimum of two (2) years of experience performing IT technical writing. Experience can include being in a position as a specialist or research assistant in a technical field.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**9) Information Security Specialist**

An Information Security Specialist interprets information security policies, standards and other requirements as they relate to internal information system and coordinates the implementation of these and other information security requirements. The Information Security Specialist redesigns and reengineers internal information handling processes so that information is appropriately protected from a wide variety of problems including unauthorized disclosure, unauthorized use, inappropriate modification, premature deletion, and unavailability.

The Information Security Specialist will provide highly specialized experience in one or more information, computer, or network security disciplines (e.g. penetration testing, accreditation, or risk assessment and mitigation); develop system security plans, certification and accreditation reviews; analyze and establish processes for comprehensive systems and data protection; assess and mitigate system security threats and risks; perform security audits, evaluation, risk assessments and make strategic recommendations; and manages, supports, installs and maintains security tools and systems, and tracks security patches and incidents.

The Information Security Specialist will possess knowledge and experience in standard methodologies used in certification and accreditation processes; extensive experience following NIST guidelines in risk assessment and management; conducting vulnerability analysis; developing mitigation plans; and performing penetration testing, password protection testing and application security testing.

Experience

This Classification must have a minimum of five (5) years of experience applying security policies, standards, testing, modification and implementation. At least three (3) years of that experience must be in information security analysis.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**10) Senior Enterprise Architect**

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A Senior Enterprise Architect applies their management skills and specialized functional and technical expertise to support complex projects in applying organizing principles and methods of enterprise architecture. Methods of enterprise architecture include IT business systems development and technical solutions that align with the business process. This is accomplished through requirements analysis, needs assessments, and selection and implementation of integration strategies including lifecycle sustainability.

The Senior Enterprise Architect will provide subject matter expertise in industry and have specific knowledge of methods including governance, architect enterprise strategy, enterprise architecture development and management; business process design and re-engineering; investment decision making and support for solution architecture development/management; and support the attainment of business strategy and its alignment with processes and information technology strategy.

The Senior Enterprise Architect must have experience end-end solution in infrastructure (compute, storage, and network) and application-level experience in delivering a complete solution for on-premises, cloud or in hybrid environment. The Senior Enterprise Architect will possess knowledge and technical expertise in standards and technologies to support complex business analysis, solution selection, systems architecture, and application integration.

Experience

This Classification must have a minimum of seven (7) years of applying Enterprise Architecture principles. At least five (5) years of that experience must be in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**11) Enterprise Architect**

An Enterprise Architect applies functional and technical expertise to support complex projects in applying organizing principles and methods of enterprise architecture. Methods of enterprise architecture include IT business systems development and technical solutions that align with the business process. This is accomplished through requirements analysis, needs assessments, and selection and implementation of integration strategies including lifecycle sustainability.

Enterprise Architects provide subject matter expertise in industry and have specific knowledge of methods including governance, architect enterprise strategy, enterprise architecture development, business process design and re-engineering, investment decision making and support for solution architecture development. They support the attainment of business strategy and its alignment with processes and information technology strategy.

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An Enterprise Architect possesses knowledge and technical expertise in standards and technologies to support complex business analysis, solution selection, systems architecture, and application integration.

Experience

This Classification must have a minimum of five (5) years of applying Enterprise Architecture principles. At least three (3) years of that experience must be in a lead capacity.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**12) Technical Architect**

A Technical Architect will serve as the manager of complex technology implementations, with an eye toward constant reengineering and refactoring to ensure the simplest and most elegant system possible to accomplish the desired need; understand how to maximize leverage of the open source community to deploy systems on Infrastructure as a Service (IaaS) providers; be comfortable sharing knowledge across a multi-disciplinary team and working within various methodologies; and be a full partner in the determination of vision, objectives, and success criteria.

The Technical Architect will architect the overall system by using prototyping and proof of concepts, which may include: modern programming languages (e.g., Ruby, Python, Node.js) and web frameworks (e.g., Django, Rails), modern front-end web programming techniques (e.g., HTML5, CSS3, RESTful APIs) and frameworks (e.g., Twitter Bootstrap, jQuery), relational databases (e.g., PostgreSQL), and "NoSQL" databases (e.g., Cassandra, MongoDB), automated configuration management (e.g., Chef, Puppet, Ansible, Salt), continuous integration/deployment, and continuous monitoring solutions; use version control systems (e.g., Git and GitHub); ensure strategic alignment of technical design and architecture to meet business growth and direction, and stay on top of emerging technologies; decompose business and system architecture to support clean-interface multi-team development; develop product roadmaps, backlogs, and measurable success criteria, and write user stories (i.e., can establish a path to delivery for breaking down stories) and clearly communicate and work with stakeholders at every level.

The Technical Architect will possess knowledge and experience in analyses and development of conceptual designs and detail designs; developing JBOSS Messaging and connectivity with Spring-JMS connectivity; designing DB schema as per the requirements and in sync with the old system; implementing the daily and weekly jobs that interact with external interfaces; coordinating with business stakeholders to understand their requirements; communicate with cross-divisional personnel at both team and executive

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levels to understand performance measurement methodologies; and direct team members in compiling business requirements and executing project milestones.

Experience

This classification must have a minimum of eight (8) years of experience in systems development, analysis, programming or testing.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**13) Visual Designer**

A Visual Designer develops a deep understanding of the goals of customers and their business needs; will be well-versed in all aspects of current visual design standards and trends and will be responsible for managing project design reviews, resource planning, and execution for all project work related to visual design; and oversees all visual design efforts.

The Visual Designer will guide, mentor, and coach team members while leading projects to successful completion; develop and maintain relationships with key peers in Marketing, Branding, UX leaders, IT leaders, and others to identify and plan creative solutions; manage external service resources and budgets for visual design; ensure successful completion of all work executed by the team (on time, on budget, and ensuring quality); ensure compliance with the project management methodologies and the Project Management Office processes and standards; develop, maintain, and ensure compliance of application release management, outage management and change control processes and standards; Defines, creates, communicates, and manages resource plans and other required project documentation such as style guides and provides updates as necessary.

The Visual Designer will possess knowledge and experience in developing requirements with clients; designing products using design software; good interdisciplinary collaboration and communication skills; work with team members to solve problems through analysis of existing systems and processes; work on full lifecycle projects from requirements gathering through design, implementation and rollout; flexibility to be creative and have an impact on designs within the general boundaries of clients expectations; work on highly interactive custom web and mobile front-ends as well as full desktop applications; ability to visualize and create high level aesthetic product designs; industrial design tools, sketching tools, Photoshop, Illustrator, rendering software (Keyshot), and 3D modeling software and exceptional follow through and organizational skills.

Experience

This classification must have a minimum of three (3) years of experience in project and product design, visual design standards, and visual design software and trends.

And Education

This classification requires the possession of a bachelor's degree in Graphic Design, Graphic Arts, or related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

#### **14)Front End Web Developer / Engineer**

A Front-End Web Developer uses modern, front end web development tools, techniques, and methods for the creation and deployment of user-facing interfaces and is comfortable working in an environment to routinely deploy changes.

The Front-End Web Developer will perform front end web development and frontend configuration capabilities for SaaS technologies using modern techniques and frameworks (e.g., HTML5, CSS3, CSS frameworks like LESS and SASS, Responsive Design, Bourbon, Twitter Bootstrap); perform JavaScript development using modern standards, including strict mode compliance, modularization techniques and tools, and frameworks and libraries (e.g., jQuery, MV\* frameworks such as Backbone.js and Ember.js, D3); develop and consumes web-based RESTful APIs; work in team environments that use various methodologies (e.g., Scrum, Lean); use version control systems (e.g., Git and GitHub); ensure Section 508 Compliance; research and learn new programming tools and techniques; work with open source solutions and community; create web layouts from static images; and create views and templates in full-stack frameworks like Rails, Express, or Django.

Front-End Web Developers will possess knowledge and experience in working on new and existing micro-sites, landing pages, and templates and provide guidance and troubleshooting support to clients; show skills such as presenting completed HTML and CSS mobile and desktop mockups to clients, fixing front end related bug issues on existing client website and HTML prototypes, and expertise in several programming languages, such as HTML5, W3C, JavaScript and CSS3.

#### **Experience**

This classification must have a minimum of four (4) years of experience in front end web development tools, techniques and methods for user-facing interfaces.

#### **And Education**

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

#### **15)Back End Web Developer / Engineer**

A Back End Web Developer uses modern, open-source software to prototype and deploy back end web applications, including all aspects of server-side processing, data storage, and integration with front end development.

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The Back End Web Developer will perform web development using open-source web programming languages (e.g., Ruby, Python), SaaS technologies and frameworks (e.g., Django, Rails); develop and consume web-based, RESTful APIs; work in team environments that use various methodologies (e.g., Scrum, Lean); author developer-friendly documentation (e.g., API documentation, deployment operations); test-driven development techniques; use version control systems (e.g., Git and GitHub); research and learn new programming tools and techniques; develop relational and non-relational database systems; develop scalable search technology (e.g. Elasticsearch, Solr) to handle large data sets and scaling their handling and storage; work with open source solutions and community; and communicate technical concepts to a non-technical audience.

Back End Web Developers will possess knowledge and experience in ability to translate technical work into user-friendly visuals; working on the back-end coding while staying plugged into emerging technologies and trends to ensure that the website is current and well maintained at all times; have a solid understanding of how web applications work including security, session management, and best development practices; programming skills HTML/CSS, security knowledge, and session management; and knowledge in one of the following programming languages: PHP, ASP.NET, JavaScript, Python or Ruby on Rails.

Experience

This classification must have a minimum of four (4) years of experience in back-end web applications, open-source web programming languages and frameworks, emerging technologies and trends, and best development practices.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**16) DevOps Engineer**

A DevOps Engineer serves as the engineer of complex technology implementations in a product-centric environment; is comfortable with bridging the gap between legacy development or operations teams and working toward a shared culture and vision; and works to arm developers with the best tools and ensuring system uptime and performance.

The DevOps Engineer will deploy and configure services using infrastructure as a service (IaaS) providers (e.g., Amazon Web Services, Microsoft Azure, Google Compute Engine, RackSpace/OpenStack); configure and manage Linux-based servers to serve a dynamic website; debug cluster-based computing architectures; use scripting or basic programming skills to solve problems; install and manage open source monitoring tools; use configuration management tools (e.g., Puppet, Chef, Ansible, Salt); Develop architecture for continuous integration and deployment, and continuous monitoring; and use containerization technologies (e.g., LXC, Docker, Rocket).

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DevOps Engineers will possess knowledge and experience in deployment and network operations, or systems administration including scripting, coding and development that focuses on improving the planning, testing and deployment; skill in configuring Linux Slackware web servers; creating custom HTML, CSS, JavaScript, Java, and C code; developing applications for Android systems; and familiarity with coding and automation tools.

Experience

This classification must have a minimum of five (5) years of experience in complex technology implementations in a product-centric environment.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**17) Security Engineer**

A Security Engineer serves as the security engineer of complex technology implementations in a product-centric environment; is comfortable with bridging the gap between legacy development or operations teams and working toward a shared culture and vision; works to ensure developers create the most secure systems while enhancing the privacy of all system users; and has experience with white-hat hacking and fundamental computer science concepts.

The Security Engineer will perform security audits, risk analysis, application-level vulnerability testing, and security code reviews; develop and implement technical solutions to help mitigate security vulnerabilities; and conduct research to identify new attack vectors.

Security Engineers will possess knowledge and experience in safeguarding sensitive data from cyber-attacks.

Experience

This classification must have a minimum of seven (7) years of experience with developing and implementing technical solutions to help mitigate security vulnerabilities.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**18) Delivery Manager**

A Delivery Manager facilitates teams for successful delivery by removing obstacles (or blockers to progress), constantly helping teams become more self-organizing, and enabling the work teams do rather than impose how it's done; manages one or more projects,

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typically to deliver a specific product or transformation via a multi-disciplinary, high-skilled digital team; is adept at delivering complex digital projects, breaking down barriers to the team, and both planning at a higher level and getting into the detail to ensure deliverables happen when needed; and defines project needs and feeds these into the portfolio/program process to enable resources to be appropriately allocated.

The Delivery Manager will deliver projects and products using the appropriate project management methodology, learning & iterating frequently; work with the Product Manager to define the roadmap for any given product and translate this into user stories; lead the collaborative, dynamic planning process prioritizing the work that needs to be done against the capacity and capability of the team; matrix-manage a multi-disciplinary team; ensure all products are built to an appropriate level of quality for the stage (alpha/beta/production); and actively and openly share knowledge of best practices.

The Delivery Manager will possess knowledge and experience in analyzing critical situations with the customer and utilizing data to troubleshoot production environments and solve issues.

Experience

This classification must have a minimum of five (5) years of experience utilizing various project management methodologies, planning processes and matrix-managing a multi-disciplinary team.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**19) Agile Coach**

An Agile Coach transforms initiatives to deliver lasting change within agencies that focus on delivering value and outcomes for residents. This role often works closely with scrum masters, product managers, and program leaders. Agile coaches enable teams to deliver products and services across an organization or organizations. Coaches may be required to work across levels including: at the team level, working with teams to ensure that delivery teams within agencies are adopting agile practices and tools while performing effectively; at the portfolio or program level, to help agencies to establish the right processes for managing a portfolio of work in an agile way; at the organization level, to drive strategic change across the organization and ensure that adoption of agile techniques is embedded from the most senior levels of the organization; or across all levels to ensure that organizations adopt a pragmatic approach to the way in which they govern delivery and continuous improvement of digital services.

The Agile Coach will embed an agile culture using techniques from a wide range of agile and lean methodologies and frameworks but be methodology agnostic. They should be able to understand waterfall approaches to be able to teach and enable agile ways of working. They help to create an open and trust-based environment by establishing



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feedback loops within the team and across disciplines, which enables a focus on outcomes, delivery and facilitates continuous improvement. They help coach the team through different phases of the delivery product life cycle; assess the culture of a team or organization and delivery processes in place to identify improvements and facilitate these improvements with the right type of support; showcase relevant tools and techniques such as coaching, advising, workshops, and mentoring. They maintain cadence of delivery by managing relationships between people and across teams, engage with stakeholders at all levels of the organization; develop clear lines of escalation, in agreement with senior managers; ensure any stakeholder can easily find out an accurate and current project or program status, without disruption to delivery; work effectively with other suppliers and agencies; apply best tools and techniques to: team roles, behaviors, structure and culture, agile ceremonies and practices, knowledge transfer and sharing, program management, cross-team coordination, and overall governance of digital service delivery; ensure key metrics and requirements that support the team and delivery are well defined and maintained; equip staff with the ability to coach others; and executive coaching on the fundamental considerations of digital service delivery design.

The Agile Coach will possess knowledge and experience in focusing primarily on training the teams to write good user stories; prioritization of the work based on business value and handling of the tasks by the team; and placing substantial efforts on team member role training, time-boxing and providing strong metrics for all players.

Experience

This classification must have a minimum of six (6) years of experience in creating and implementing an agile culture utilizing agile methodologies and frameworks in complex teams and organizations.

And Education

This classification requires the possession of a bachelor's degree in an IT-related, project management, leadership, communications, or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis. Also requires the possession of certification in Agile Coach.

**20)Analyst**

An Analyst is familiar with a range of digital/web services and solutions, ideally where open source and cloud technologies and various development methodologies have been applied; has an eye for detail, excellent communication skills, and ability to rationalize complex information to make it understandable for others to work; and ability to interrogate reported information and challenge sources where inconsistencies are found.

The Analyst will support agencies by analyzing propositions and assessing decision-making factors such as strategic alignment, cost/benefit, and risk; work closely with the Product Manager to define a product approach to meet user needs; define skill requirements and map internal, agency, and external (partners/specialist contractors) resources; work with the owning agency to ensure they have the budget to cover the

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proposed approach and resource requirements during delivery and analyze what provision they have for ongoing running costs; analyze and map the risks of this product approach and propose mitigation solutions; define how the predicted user and financial benefit can be realized, and how channel shift will be measured; and make a recommendation for action against the analysis done.

The Analyst will possess knowledge and experience in ensuring enhanced processes and services are technically, operationally, and legally supported by analyzing and compiling requirements and solidifying successful implementation; strengthening risk mitigation techniques and improved process efficiencies while meeting stringent regulatory requirements; developing, coordinating, and implementing methodology and scope for multiple complex projects; strong analytical and research techniques to identify gaps and inconsistencies within current measurement tools, allowing development of improved and cost-effective models; and performing requirements analysis, documentation and quality assurance for each deliverable.

Experience

This Classification must have a minimum of five (5) years of experience applying analytical processes on IT projects. At least three (3) years of that experience must have been in systems analysis and design.

And Education

This Classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**21) Digital Performance Analyst**

A Digital Performance Analyst specifies, collects, and presents key performance data and analysis for a given digital service; supports Product Managers by generating new and useful information and translating it into actions that will allow them to iteratively improve their service for users; possesses analytical and problem-solving skills necessary for quickly developing recommendations based on the quantitative and qualitative evidence gathered via web analytics, financial data, and user feedback; is confident in explaining technical concepts to senior officials with limited technological background; and is comfortable working with data, from gathering and analysis through to design and presentation.

A Digital Performance Analyst will support the Product Manager to make sure their service meets performance requirements; communicate service performance against key indicators to internal and external stakeholders; ensure high-quality analysis of agency transaction data; support the procurement of the necessary digital platforms to support automated and real-time collection and presentation of data; share examples of best practice in digital performance management across government; and identify delivery obstacles to improving

transactional performance in agencies and working with teams to overcome those obstacles.

A Digital Performance Analyst will possess knowledge and experience in analyzing investment activities; evaluating investment projects and objectives; and performing detailed analyses of portfolios, and creating reports that summarize factors like peer rankings, portfolio positioning, attributes performance, and quantified risks.

Experience

This classification must have a minimum of four (4) years of experience identifying, collecting and presenting performance data and analysis to ensure and improve service performance.

And Education

This classification requires the possession of a bachelor's degree in an IT-related or Engineering field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**22)Data Analyst**

A Data Analyst supports the organization by translating business initiatives and goals into analytical questions, identifying critical metrics, conducting analysis, and developing reporting. Additionally, they will help identify relevant datasets, contribute to data transformations, clean data, and conduct exploratory and statistical analyses to identify, analyze, and interpret trends or patterns in complex datasets.

A Data Analyst must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. A Data Analyst must be able to derive insights that advance the business needs and that are actionable by the client. They must be able to articulate and present these insights in ways that the client understands and is able to take action on. They must be comfortable starting with ill-defined datasets and problems and helping stakeholders to unpack what will be most helpful and achievable given the data available.

The Data Analyst must also be an effective data storyteller with a strong background in written and oral communications and a demonstrated ability to translate complex concepts into actionable insights.

They work with structured data of various kinds and sizes in databases or spreadsheets, using scripting languages and/or SQL to manipulate data. They should be familiar with data modelling concepts and be able to shape and reshape data as needed. A Data Analyst will also create visualizations, reports, and present findings, using business intelligence applications, spreadsheets, or code.

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A Data Analyst also contributes to defining data quality needs to support analysis and should be proficient in profiling data to support data quality definitions. They may need to implement quality monitoring or work with others to do so and should be able to communicate the impact of data quality on analyses.

They may work with other data analysts, data scientists, data modelers, business intelligence analysts, and data engineers to define requirements to implement more complex ongoing analysis (e.g., analyses on big datasets or real time data).

They may be required to create documentation and provide training to inform stakeholders and cultivate data literacy within the organization.

Experience

This Classification must have a minimum of two (2) years of experience as a data analyst or in other quantitative analysis or engineering disciplines, such as researcher, data engineer or BI analyst.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**23)Senior Data Analyst**

A Senior Data Analyst leads work to enable stakeholders across the organization by translating initiatives and goals into analytical questions, identifying critical metrics, conducting analysis, developing reporting, and leading efforts to uncover levers that could improve decision making and program outcomes. Additionally, they will work with staff to identify relevant datasets, contribute to data transformations, clean data, and conduct exploratory and statistical analyses to identify, analyze, and interpret trends or patterns in complex datasets.

A Senior Data Analyst must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. A Data Analyst must be able to derive insights that advance the needs and that are actionable by the client. They must be able to articulate and present these insights in ways that the client understands and is able to take action on. They must be comfortable starting with ill-defined datasets and problems and helping stakeholders to unpack what will be most helpful and achievable given the data available.

The Senior Data Analyst must also be an effective data storyteller with a strong background in written and oral communications and a demonstrated ability to translate complex concepts into actionable insights.

They work with structured data of various kinds and sizes in databases or spreadsheets, using scripting languages and/or SQL to manipulate data. They should be familiar with data modelling concepts and be able to shape and reshape data as needed. A Senior Data

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Analyst will also create visualizations, reports, and present findings, using business intelligence applications, spreadsheets, or code. They will also provide mentorship, expertise and feedback to other analysts and help establish standards for analytical work.

A Senior Data Analyst also informs the organization of data quality challenges and can recommend interventions (technical, policy or organizational) for maintaining necessary quality to support analysis. They have competencies to work across different aspects of projects to inform how data is captured, stored and managed to enable manipulation and analysis. They may need to implement quality monitoring or work with others to do so and should be able to communicate the impact of data quality on analyses.

They may work with data scientists, data modelers, business intelligence analysts, and data engineers to define requirements to implement more complex ongoing analysis (e.g., analyses on big datasets or real time data).

They may be required to create documentation and provide training to inform stakeholders and cultivate data literacy within the organization.

#### Experience

This Classification must have a minimum of five (5) years of experience as a data analyst or in other quantitative analysis or related disciplines, such as researcher, data engineer or BI analyst.

#### And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

### **24) Geospatial Engineer**

A Geospatial Engineer prepares analyses of spatial data, including but not limited to static maps, interactive maps, and other derived spatial data products. They share core competencies of a Data Analyst but will be more specialized working with spatial data and best practices around spatial visualization.

A Geospatial Engineer must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. The position may benefit from specific domain knowledge to synthesize data into actionable insights based on the program's need. Distinct from a data analyst, the Geospatial Engineer will be expected to hold expertise on working with spatial data and be able to leverage that expertise with stakeholders. They must be comfortable starting with ill-defined datasets and problems and helping stakeholders to unpack what will be most helpful and achievable given the data available.

A Geospatial Engineer must be able to translate business value goals into usable and useful maps, visuals, and underlying data models that support them. They work with

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structured data of various kinds and sizes in databases, GIS, or spreadsheets, using scripting languages, SQL and/or GIS to manipulate data. They have competencies to work across different aspects of projects to inform how data is captured, stored and managed to enable manipulation and analysis. A Geospatial Engineer will also create visualizations, reports, and present findings, using GIS or code.

They should be comfortable working with a range of statistical and analytical techniques using spatial and non-spatial data. They will demonstrate strong spatial analysis skills that could include but not be limited to: spatial aggregations and joins, neighborhood analysis (nearest neighbor, k-function, etc.), and raster analysis.

A Geospatial Engineer may need to develop strategies for working with real time and/or big spatial datasets depending on the organization's needs. They may need to work with other analysts, data scientists, data engineers, data modelers and IT staff for more complex ongoing analyses that require live access to data but should be proficient enough to prototype and define those needs with staff.

A Geospatial Engineer must be able to work with modern open source (GRASS, QGIS, etc.) or proprietary ESRI GIS toolsets as required to perform complex spatial data analysis to support program objectives. They should be proficient in the use of current and popular commercial low code / no code cloud GIS tools (ArcGIS Online, etc.).

Experience in Extract/Load/Transform (ETL) Tools, Data Interoperability best practices, Digitizing techniques, geographic standards, and coordinate systems, Cartographic design principles, Raster and vector data creation and editing. Experience in Geo-referencing, geoprocessing, and geocoding techniques and methods. Experience with 3D corridors and surface models, Linear referencing, Publication and incorporation of web mapping services. Experience in Python. Ability to convert multiple data formats to spatial data. They may be required to create documentation and provide training to inform stakeholders and cultivate data literacy within the organization.

#### Experience

This Classification must have a minimum of three (3) years of experience in geospatial analysis using GIS or geospatial frameworks. Project work should demonstrate excellence in geospatial analysis techniques and approaches.

#### And Education

This classification requires the possession of a bachelor's in geography or IT, or an advanced degree (master's or PhD) in geography or IT. Also requires the possession of certification in geospatial technologies, including, but not limited to GISP. Additional qualifying experience may be substituted for the required bachelor's in geography or IT, or an advanced degree (master's or PhD) in geography or IT on a year-for-year basis.

### **25) Geospatial Application Developer**

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The Geospatial Application Developer is responsible for the development of new GIS applications, maintenance and operations of existing GIS applications, including updating system documents; geodatabase modeling; system administration; data management; performance tuning; installing updates and patches; and maintaining geospatial databases and metadata. They maintain expertise in existing and emerging GIS-related software and technologies and evaluate to improve program use of geospatial data and applications.

They will perform quality assurance of GIS data and processes in accordance with organizational standards and facilitate data collaboration among program stakeholders. They work with IT and program staff to resolve application issues and ensure and follow the established change management and release management processes of the organization. They may need to maintain data assets in existing or new solutions per established principles and policies of the organization.

The Geospatial Application Developer will also participate in the definition of solution requirements, analysis, and lead the solution design and development of GIS applications to meet organizational needs. They will be able to translate business needs into solutions that work for the program and should be able to account for GIS needs in different contexts: out in the field, mobile or desktop. They will develop and/or review Software Development Lifecycle (SDLC) policies to ensure requirements, strategies, standards, plans, and policies are met.

They will assist in implementing IT policies, plans, processes, and standards related to GIS and participate in the analysis and selection process of new IT services and solutions to meet identified partner needs, especially where the collection, analysis and interpretation of geospatial data is a concern.

The Geospatial Application Developer will conduct continuous improvement efforts for application development, maintenance, and support processes to optimize operations; assist with the development and maintenance of continuity plans; and ensure established standards and best practices for system design, development, deployment, and system maintenance and operations are followed. They will also provide technical expertise to IT and program staff on matters related to GIS. Must have experience with JavaScript and Python. Must have knowledge of and/or proficiency with Web application development utilizing modern API's and user interface design techniques.

Experience

This Classification must have a minimum of three (3) years of experience in supporting and/or developing geospatial applications.

And Education

This classification requires the possession of a bachelor's degree in GIS, computer science, IT, engineering or related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

## **26) Business Intelligence Analyst**

Business Intelligence (BI) Analyst is responsible for preparing dashboards, charts, and other statistics/information from compiled datasets for use by decision makers, the public and other stakeholders. A BI Analyst enables program leaders and stakeholders with accurate and timely data to support decision-making, using a BI platform or framework to implement. They share core competencies with a data analyst but specialize in implementing analyses in the context of a BI framework.

A BI Analyst must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. They must be comfortable starting with ill-defined datasets and problems and helping stakeholders to unpack what will be most helpful and achievable given the data available. Essential to this work is the development and standardization of Key Performance Indicators (KPIs) that are relevant to tracking a program or State organization's success.

A BI Analyst must be able to translate business value goals into usable and useful visualizations and underlying data models that support decision-making. They work with structured data of various kinds and sizes in databases, warehouses or spreadsheets, and must have strong SQL skills and be able to work in one or multiple BI frameworks depending on need (Power BI, Tableau, Looker, etc.) They should be fluent in data modelling concepts and tools. Experience and comfort with data manipulation in other languages (Python, R, Scala, etc.) is helpful, but not always required.

A BI Analyst must be able to design user-centered dashboards and visualizations and use best practices for user interaction and interface design. They may work with other design professionals (interface designers, user researchers, etc.) to solicit feedback and improve BI products (dashboards, reports, metrics, etc.)

They may work with other analysts, data scientists, data modelers, data engineers, and warehouse architects to implement more complex data models, but ideally are capable of prototyping to assist in that work. They may also need to work with IT staff to design and implement secure and sustainable paths for data access from systems to support timely dashboards.

They may be required to create documentation and provide training to inform stakeholders and cultivate data literacy within the organization.

### **Experience**

This Classification must have a minimum of two (2) years of experience in data analysis, with minimum six (6) months of that experience developing business intelligence reports.

### **And Education**

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.



## **27)Data Scientist**

A Data Scientist is responsible for analyzing, processing, and modeling data and then communicating the results to inform actionable plans and decisions for the organization. A Data Scientist will need to be able to exercise judgement on selecting the most appropriate method(s) to the analytical question and supporting data. They should be skilled at translating methods to a lay audience.

They understand the constraints of datasets and are involved in identifying relevant data sources. They are fluent in one or more data manipulation programming languages (e.g., R, Python, Scala, etc.) They are proficient at working with structured and unstructured datasets of varying sizes and complexity, with experience working in big data management and data mining.

They need to be able to organize, clean, and transform data into usable formats in order to apply the appropriate statistical models or algorithms. They are proficient at automating data collection and preprocessing of data.

They also will do analysis, including ad-hoc analysis, looking for trends and patterns across large and multiple datasets, answering specific questions, and developing and validating hypotheses. In the course of doing exploratory data analysis and sharing findings they will create visualizations and charts to further understand and communicate insights and to identify underlying data issues (missing data, poor quality, etc.) that may constrain or influence the interpretation of results. They will need to present findings to key stakeholders and demonstrate relevant domain knowledge.

They will develop, test, and implement predictive and machine-learning models and algorithms using a mix of statistical and machine learning approaches.

They may need to work with data engineers, data modelers, business intelligence analysts and IT staff to set up more complex ongoing analyses that feed dashboards or other data products.

They may be required to create documentation and provide training to inform stakeholders and cultivate data literacy within the organization.

### **Experience**

This Classification must have a minimum of three (3) years of relevant experience in mathematical modeling, statistical analysis, machine learning, AB testing, or data science in an applied context using statistical programming languages, SQL, and other scripting and statistical tools as well as proficiency in one or more visualization tools

### **And Education**

This classification requires the possession of a master's degree or higher in economics, statistics, math, engineering, science, social science, data science or other quantitative

focused field. Additional two (2) years of qualifying experience may be substituted for the required education along with demonstrated completion of training, bootcamps, or supplemental coursework in mathematical modeling, statistical analysis, and machine learning methods.

### **28) Senior Data Scientist**

A Senior Data Scientist is responsible for analyzing, processing, and modeling data and then communicating the results to inform actionable plans and decisions for the organization. A Senior Data Scientist will need to be able to exercise judgement on selecting the most appropriate method(s) to the analytical question and supporting data. They should be skilled at translating methods to a lay audience.

They understand the constraints of datasets and are involved in identifying relevant data sources. They are fluent in one or more data manipulation programming languages (e.g., R, Python, Scala, etc.) They are proficient at working with structured and unstructured datasets of varying sizes and complexity, with experience working in big data management and data mining.

They need to be able to organize, clean, and transform data into usable formats in order to apply the appropriate statistical models or algorithms. They are proficient at automating data collection and preprocessing of data.

They also will do analysis, including ad-hoc analysis, looking for trends and patterns across large and multiple datasets, answering specific questions, and developing and validating hypotheses. In the course of doing exploratory data analysis and sharing findings they will create visualizations and charts to further understand and communicate insights and to identify underlying data issues (missing data, poor quality, etc.) that may constrain or influence the interpretation of results. They will need to present findings to key stakeholders and demonstrate relevant domain knowledge.

They will develop, test, and implement predictive and machine-learning models and algorithms using a mix of statistical and machine learning approaches.

They will manage and mentor other more junior data scientists and are distinguished from Data Scientists both in years of experience and by providing leadership in introducing new methods and supporting infrastructure.

They may need to work with data engineers, data modelers, business intelligence analysts and IT staff to set up more complex ongoing analyses that feed dashboards or other data products.

#### **Experience**

This Classification must have a minimum of five (5) years of relevant experience in mathematical modeling, statistical analysis, machine learning, AB testing, or data science

in an applied context using statistical programming languages, SQL, and other scripting and statistical tools as well as proficiency in one or more visualization tools.

#### And Education

This classification requires the possession of a master's degree or higher in economics, statistics, math, engineering, science, social science, data science or other quantitative focused field. Additional two (2) years of qualifying experience may be substituted for the required education along with demonstrated completion of training, bootcamps, or supplemental coursework in mathematical modeling, statistical analysis, and machine learning methods.

### **29)Data Engineer**

A Data Engineer supports the inventorying, gathering, cleaning, processing, and programming of automated datasets and data pipelines for use by analysts and others. They are also concerned with clear documentation and work with analysts and others to ensure the output datasets are well-defined for use.

A Data Engineer must be able to work with analysts and subject matter experts to define and build requirements for automated datasets, including but not limited to defining business transformations, validation rules, and frequency of updates. The ability to map the requirements on to an efficient and sustainable solution is necessary. Expertise in modern ETL/ELT (Extract Transform Load / Extract Load Transform), data profiling, and other data quality tools and approaches is required.

A Data Engineer may also be involved in the identification of datasets with lines of business, particularly around a project or program need. They may be involved in helping to make a catalog of raw datasets accessible to analysts, data scientists and others for more exploratory analysis to inform the development of data products and services. They will need to work closely with analysts, data scientists, data modelers, warehouse architects, and IT staff to design and implement proposed solutions and architectures that meet business needs.

A Data Engineer should be fluent in one or more data manipulation languages with an emphasis on frameworks appropriate for production code and depending on need (e.g., Java, Scala, Python, Advanced SQL, etc.) They should also be able to implement data automations within existing frameworks as opposed to writing one off scripts.

While they should have proficiency in code, they should also be comfortable implementing in low-code ETL/ELT platforms if that is the more sustainable approach for the organization. Experience to data engineering in Google Cloud, Amazon Web Services, and/or Microsoft Azure.

#### Experience

This Classification must have a minimum of two (2) years of relevant experience in authoring and monitoring data pipelines.

### And Education

This classification requires the possession of a bachelor's or advanced degree (master's or PhD) in computer science, engineering, information systems, math or technology-related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis. Successful completion of a data engineering bootcamp plus an additional year of experience may be substituted for the degree requirement.

### **30)Senior Data Engineer**

A Senior Data Engineer leads the inventorying, gathering, cleaning, processing, and programming of automated datasets for use by analysts and others. They may work with other data engineers and act as mentor, expert, and project manager to implement data engineering projects. They are concerned with establishing standard practices that enable continuous improvement and data operations, including but not limited to documentation, tooling, and project intake, prioritization, and management.

A Senior Data Engineer must be able to work with analysts and subject matter experts to define and build requirements for automated datasets, including but not limited to defining business transformations, validation rules, and frequency of updates. The ability to map the requirements on to an efficient and sustainable solution is necessary. Expertise in modern ETL/ELT (Extract Transform Load / Extract Load Transform), data profiling, and other data quality tools and approaches is required.

A Senior Data Engineer may also be involved in the identification of datasets with lines of business, particularly around a project or program need. They may be involved in helping to make a catalog of raw datasets accessible to analysts, data scientists and others for more exploratory analysis to inform the development of data products and services. They will need to work closely with analysts, data modelers, warehouse architects, and IT staff to design and implement proposed solutions and architectures that meet business needs.

A Senior Data Engineer should be fluent in one or more data manipulation languages with an emphasis on frameworks appropriate for production code and depending on need (e.g., Java, Scala, Python, Advanced SQL, etc.). They should also be able to implement data automations within existing frameworks as opposed to writing one off scripts. They may spend less time on writing code or constructing pipelines as they will lead on ensuring work products meet quality standards through a mix of methods including but not limited to peer review, pair programming, and automated testing. This is dependent on program needs and complexity of projects.

While they should have proficiency in code and best practices in engineering management, they should also be comfortable implementing in low-code ETL/ELT platforms if that is the more sustainable approach for the organization. Experience to data engineering in Google Cloud, Amazon Web Services, and/or Microsoft Azure.

### Experience

This Classification must have a minimum of four (4) years of relevant experience in authoring and monitoring data pipelines.

And Education

This classification requires the possession of a bachelor's or advanced degree (master's or PhD) in computer science, engineering, information systems, math or technology-related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis. Successful completion of a data engineering bootcamp plus an additional year of experience may be substituted for the degree requirement.

**31) Data Modeler**

A Data Modeler designs and implements data modeling solutions using relational, dimensional, and NoSQL databases depending on need. They work closely with data architects to design databases or data warehouses using a mixture of conceptual, physical, and logical data models. They are concerned with models that can improve the interoperability of data among systems and improve the performance of underlying data queries and data movement that feed applications.

A Data Modeler must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. They must lead working groups and stakeholder meetings for data specifications and know the appropriate level of specificity to model at different stages of a project from conceptual to logical to physical. They perform research with technical staff and data users to determine the ideal interfaces for implementation of future technical systems.

A Data Modeler may be involved in the evaluation of existing data systems, including constructing as-is data models (where they are not already documented) and identifying foundational data model issues that could affect the efficient and effective use of data (e.g., slow queries, poorly validated data, unnecessary duplication of data, etc.) They may also do hands-on troubleshooting to optimize data system query performance where appropriate.

A Data Modeler works with the project delivery team to define risks and tradeoffs related to different design choices and to help the organization make informed decisions about implementation options for new or rebuilt systems. And they may also contribute by identifying options for architecture, infrastructure, and interfaces to data sources that enable appropriate use by lines of business.

They may also define and set up governance for data modeling and design standards, tools, best practices, and related development for enterprise data models, so that work can be repeatable across projects and programs. This is dependent on the program's needs.

A Data Modeler should be comfortable modeling data for relational, dimensional, and NoSQL databases; however, they may be focused on modeling in one more than the

others depending on the project context. They should be proficient in data modeling and query analysis tools (e.g., Power Designer, DAX Studio, ERWin, ER/Studio, etc.) and SQL.

Experience

This Classification must have a minimum of three (3) years of relevant experience in data modeling.

And Education

This classification requires the possession of a bachelor's or advanced degree (master's or PhD) in computer science, engineering, math or related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**32)Data Warehouse Architect**

A Data Warehouse Architect designs data warehouse architectures to support organizational goals. They understand how to build data warehouse models that can optimally serve BI and analytic needs. They can evaluate the tradeoffs of different schema implementations (e.g., star schema vs. snowflake schema), consider data throughput constraints, and propose a best fit architecture and infrastructure for the defined problem.

A Data Warehouse Architect must be able to work with subject matter experts across programs, divisions, policy areas, and levels of knowledge. They work with data modelers, analysts, program and technical staff to collaboratively define data needs and technical constraints that can influence the warehouse architecture design. These can include requirements of data timeliness, location of source data, latency of connections to data centers, and the amount of data to name some but not all considerations.

A Data Warehouse Architect will be familiar with ETL/ELT (Extract Transform Load / Extract Load Transform) approaches, and while they won't have to implement ETL/ELT, they will have to propose warehousing approaches that fit with the defined ETL/ELT framework or work with data engineers to define an optimal approach.

A Data Warehouse Architect should be able to model data primarily for dimensional models, but be able to interpret data models for relational and/or NoSQL databases to appropriately map source data to the warehouse target schema. They should be proficient in using tools to develop and iterate on dimensional models (e.g., Power Designer, DAX Studio, ERWin, ER/Studio, etc.) and SQL.

Experience

This Classification must have a minimum of five (5) years of relevant experience in data modeling, database design, and warehouse architecture.

And Education

This classification requires the possession of a bachelor's or advanced degree (master's or PhD) in computer science, engineering, math or related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

### **33)Product Lead**

A Product Lead collaborates with the Product Manager to scope user-centered product needs, build user stories around feature development, create acceptance criteria, and determine the practices and processes for the delivery team to implement towards product delivery goals. The Product Lead will establish and manage product organizations comprising multiple product lines tied directly to business functions and programs that support user needs.

The Product Lead will own the end-to-end delivery process with a focus on lean practices and user-centered discovery to inform and prioritize iterative product improvements; develop user stories for features based on user discovery and research; maintain consistency across process workflows.

The Product Lead will possess knowledge and experience in lean and agile processes (SCRUM mastery a plus), development and delivery of digital products such as websites and software applications; work closely with designers and engineers to bring the product to market; and the technical know-how to communicate with the engineering department.

#### Experience

This Classification must have a minimum five (5) years of experience in leading lean and agile iterative processes for product deliverables; UX research; meeting product requirements and timetables; managing team well-being and optimizing workflows.

#### And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-to-year basis. Successful completion of a bootcamp in a related field plus an additional year of experience may be substituted for the degree requirement. [PL and PM ed requirements are now matching]

### **34)Product Manager**

A Product Manager facilitates product vision alignment and strategy to meet clear data driven goals and success metrics. They act as champions of stakeholders to align and meet their expectations, champions of the team to optimize workflow velocity and well-being by cutting through uncertainty, champions of design and the end user in discovering and validating real user value, and act as the voice of product as it orients towards user-centered service delivery. They also manage the delivery, ongoing success, and continuous improvement of one or more digital products and/or platforms in collaboration with the Product Lead.

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The Product Manager will lead one or more multi-disciplinary delivery teams to deliver excellent new products and/or iterations to existing products to meet user needs; gather user requirements based on a communicable understanding of diverse audience groups; define and get stakeholder buy-in for product definition and delivery approach; create effective, prioritized product descriptions, and delivery plans to meet user needs in a cost-effective way; interpret user research in order to make the correct product decisions; continually keep abreast of changes to user habits, preferences, and behaviors across various digital platforms and their implications for successful delivery of government digital services; underpin the delivery and iteration of digital services through effective analysis of qualitative and quantitative user data; and communicate credibly with a wide range of digital delivery disciplines and talent.

The Product Manager will possess knowledge and experience in development and delivery of digital products such as websites and software applications; collaboration with leaders to develop and facilitate a product vision and then work closely with designers and engineers to ship the product; both systems acumen and the technical know-how to communicate across disciplines: research/analytics, design, content, and engineering.

The Product Manager is familiar with agile, SCRUM, and lean methodologies and well-versed in standard project and program management processes.

Experience

This classification must have a minimum of three (3) years of experience in understanding end-to-end product development cycles developing products; UX conducting market research; generating product requirements; determining product road maps and specifications, production timetables, and time-integrated plans for product introduction; and developing service to market strategies; and managing client service relations.

And Education

This classification requires the possession of a bachelor's degree. Successful completion of a bootcamp in a related field plus an additional year of experience may be substituted for the degree requirement.

**35) Content Strategist**

The Content Strategist will lead the information architecture on digital products and experiences and create content style guides and collaborate with designers and other content strategists to measure and improve the effectiveness of digital, print, and other content. The Content Strategist will develop content strategies to build and scale inclusive language and accessible design. They will lead the information architecture on digital products and experiences and collaborate with designers and other content strategists to measure and improve the effectiveness of digital, print, and other content. They will contribute to increasing the quality and visibility of relevant content and services by applying best practices in SEO in search engine results (edit content, add content, and



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modify HTML and associated coding to both increase its relevance to specific keywords and remove barriers to the indexing activities of search engines).

They will develop and maintain appropriate voice for produced content; advise how to streamline content production and management solutions and processes based on user research; assign, edit, and produce content for products, services, and various projects; plan and facilitate content strategy workshops and brainstorming sessions on developing content and content services (including API development); collaborate closely with developers and designers to create, test, and deploy effective content marketing experiences using various methods of software development; offer educated recommendations on how to deliver a consistent, sustainable and standards-driven execution of content strategy across products, services, and projects; and collaborate with content managers, writers, information architects, interaction designers, developers, and content creators of all types.

The Content Strategist will possess knowledge and experience in representing key members of creative teams and developing content strategies for various clients and projects; selecting an appropriate content management system; organizing website content; collaborating with the information architect in creating content, enforcing content guidelines and developing editorial calendars; displaying editorial skills and excellent writing abilities; leadership; information technology tools; project management skills; and time management.

Experience

This classification must have a minimum of three (3) years of experience in developing and executing content strategy and developing content across digital channels.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**36)Content Designer**

Content Designers (or UX writers) make things easier for people to understand and use. This can involve working on a single piece of content or on the end-to-end journey of a service to help users complete their goal and government deliver a policy intent. In this role the Content Designer's work may involve the creation of, or changes to, a transaction, product or single piece of content that stretches across digital and offline channels. The Content Designer will be expected to make sure appropriate content is shown to a user in the right place and in the best format start from discovery and work closely with user researchers, service designers and interaction designers. The Content Designer will develop inclusive language and accessible design.

The Content Designer makes sure all content meets user needs. This includes the text, visuals and interactive content. They work with subject matter experts to write clear text in plain language; review content to make sure it's accurate and written in line with the state

content guidelines or standards; structure content to reflect how users read online and on different devices; make sure content is accessible and inclusive; make sure content is searchable and findable; use research and data to make sure content meets user needs; communicate the principles of content design to the team and agency; plan, organize, direct and edit content for editorial users and audiences; shape the voice and tone of products through writing and research; translate UX research into language that anticipates needs and makes the experience easier to understand.

#### Experience

This classification must have a minimum of one (1) year of experience in the execution of content across digital channels.

#### And Education

This classification requires the possession of a bachelor's degree in a writing-intensive field such as English, Journalism, Communications, User Experience, Library Science, Technical Writing, Information Management or social sciences such as psychology, sociology, demography, geography, anthropology, statistics, policy analysis, or a research-related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

### **37)User Experience Researcher**

User Experience Researchers plan, design and carry out research activities with users that help teams get a deep understanding of the people that use government services. This research informs policy, proposition, service, content, and interaction design so that services work well for users and achieves policy intent. User Experience Researchers help the team understand their existing users by regularly talking to, observing, and gathering feedback. Also, help the team reach out to harder to reach people by finding ways to meet them where they are.

User Experience Researchers will design and conduct research activities that turn research data into clear findings that inform decisions on service design, involving clients and partners in analysis and synthesis to increase consensus and challenge assumptions. They will include all kinds of users in appropriate research activities to help teams deliver accessible services to the diversity of users of government services. They will capture and share real stories to help build empathy for users.

The User Experience Researcher will possess knowledge and understand and have experience of a range of user research methods, including qualitative and quantitative research methods. They will understand how to choose appropriate methods for different stages of the product life cycle and situations and apply methods correctly. This can include but is not limited to crafting surveys to inform design and content strategy; recruiting and screening participants using a variety of techniques; creating human-centered frameworks such as user journeys and behavior archetypes; maintaining and tracking research activities across multiple sprints; creating discussion guides, screeners, and research

plans; conducting usability and timed-task tests; and producing user requirements specifications and experience goals, personas.

The User Experience Researcher will understand the social and technological context for government services and help colleagues understand how digital technology is changing user behavior, and the challenges and opportunities for government services. The User Experience Researcher demonstrates knowledge of the technologies used to build and operate digital services; understands the different technical roles in a multidisciplinary team; and recommends system enhancements according to research insights. The User Experience Researcher understands user-centered design practices and knows how to embed them into an agile workflow to deliver timely findings. They have the ability to work in an open, iterative and collaborative way in a multidisciplinary team.

#### Experience

This Classification must have a minimum of three (3) years of experience in conducting user research, analysis, and synthesis, could be a combination of qualitative and quantitative research.

#### And Education

This classification requires a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

### **38) Usability Tester**

The Usability Tester gathers feedback about how people interact with a digital solution, the intuitiveness of the interface, the understandability of the content and the relevance of the solution to their needs and challenges.

The Usability Tester designs testing plans and protocols, prepares for and runs usability tests, and synthesizes results and findings. The testing plans will include subjective metrics and quantitative metrics to track across an individual user in a test as well as across all users in a test. They test the usability of digital solutions and web applications using a variety of off-the-shelf and custom programs and platforms; work closely with the product team to understand the key questions or product choices they want to make and how usability data can help inform their choices; collaborate with other researchers on the team to understand and guide how usability testing fits into a larger research and feedback strategy; plan, recruit, and facilitate the usability testing of a system; collect information about product usability from a variety of channels; conduct usability tests with users in person or remotely; interact with users to understand how they use, respond to and work with specific digital solutions; analyze and synthesize the results of usability testing in order to provide recommendations for change to a system; gather data, summarize it and present it in a way that is clear, easy to understand and actionable; and create such artifacts as Usability Testing Plan, Testing Scripts, and Usability Testing Report. They test products and services to make sure they are compliant with accessibility best practices and with required laws such as WCAG 2.1. The Usability Tester reports bugs for the product team and engineering to address.

Experience

Must have a minimum of one (1) year of experience in usability testing in addition to working knowledge of various programming languages and development platforms, sharp eye for detail and communication, reporting, and troubleshooting skills.

And Education

This classification must have either a relevant certification or a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**39)UX/Interaction Designer**

The UX/Interaction Designer is part of a highly collaborative, multi-disciplinary team focused on improving usability, user experience, and driving user adoption and engagement; and responsible for conducting interaction design.

The UX/Interaction Designer will design and specify user interfaces and information architecture; lead participatory and iterative design activities, including observational studies, and other forms of requirements discovery; produce system maps, user scenarios, flowcharts, design prototypes, and design specifications; effectively communicate research findings, conceptual ideas, detailed design, and design rationale and goals both verbally and visually; plan and facilitate collaborative critiques and analysis and synthesis working sessions; work closely with visual designers and development teams to understand product requirements and ensure that customer goals are met and design specifications are delivered upon; design and develop primarily internet/web pages and applications; develop proof-of-concepts and prototypes of easy-to-navigate and intuitive user interfaces (UIs) that consists of web pages with graphics, icons, and color schemes that are visually appealing.

The UX/Interaction Designer will gather feedback about concepts, prototypes and finished products and improve interfaces and the user experience as needed from research and testing. They will design for accessibility and make interfaces that are usable by a wide variety of people who have very different abilities and backgrounds. They will translate larger strategic, policy, program and service requirements into clear requirements and compelling experiences. They will create concepts for what future experiences may work like and illustrate potential scenarios of use in various visual and digital forms.

The UX/Interaction Designer will possess knowledge and experience in using a mix of text, images, data, sound, animation and other effects to create interactive communication products as part of a product development team, use multimedia software, create design concepts, create wireframes and interface mock-ups, monitor design performance and ensure compliance with guidelines; and displaying imagination, creativity, computer technology expertise, teamwork, communication, and self-motivation.

Experience

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This classification must have a minimum of three (3) years of experience in doing digital design, user research, qualitative analysis & synthesis, interaction design.

And Education

This classification requires the possession of a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**40)Customer Experience Architect**

A Customer Experience Architect designs and tests processes to capture, understand and respond to feedback that's both internal from employees and external from customers and stakeholders. They are concerned both with creating a voice of the customer function and operationalizing insights and experiments back into the program or project. They design and organize processes and information around the customer – who they are and what their needs are, and then integrate customer data to create useful insights that are shared across the right teams and increasingly interwoven with the fabric of the project or program.

A Customer Experience Architect must be able to collaborate with customers, data engineers, analysts, and subject matter experts with a variety of skills from different disciplines to create delightful customer journey experiences and to define and build requirements for datasets and processes. The ability to map requirements on to an efficient and clear design to facilitate decision-making is necessary. Expertise in ETL/ELT (Extract Transform Load / Extract Load Transform), data profiling, and other data quality tools and approaches are strongly preferred to design the experience customers need across key interactions and processes.

A Customer Experience Architect may also be involved in the identification of datasets with lines of business, particularly around a project or program need. They will need to work closely with management, analysts, data modelers, and IT staff to design and test proposed solutions and architectures that meet customer and business needs.

A Customer Service Architect should be fluent in one or more data manipulation languages as well as service design.

While they should have some proficiency in code and best practices in engineering management, they should primarily be comfortable implementing in low-code ETL/ELT platforms if that is the more sustainable approach for the organization.

Experience

This Classification must have a minimum of three (5) years of relevant experience in one or more of the following areas: business process modelling/mapping, authoring service design, developing customer experience programs.

And Education

This classification requires a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**41)Customer Experience Analyst**

A Customer Experience Analyst gathers and interprets data on customer needs, satisfaction, perceptions, and capacity on behalf of a program or project. They conduct surveys to collect stakeholder feedback, analyze data, perform research, and create reports that are both internal from employees and external from customers and stakeholders. They are concerned both with identifying and reporting on a voice of the customer function and surfacing insights for project or program management to operationalize back into the program or project.

They audit and analyze processes and information around the customer – who they are and what their needs are, and then integrate customer data to create useful insights that management may choose to be shared across the right teams and interwoven with the fabric of the project or program to promote operational rigor. They identify process improvement opportunities or necessary process changes for better data collection to serve the customers.

A Customer Experience Analyst must be able to collaborate with service architects/designers, data engineers, other types of analysts, and subject matter experts with a variety of skills from different disciplines for internally facing analysis, and with the stakeholders and end-users for externally facing analysis.

A Customer Experience Analyst may also be involved in the identification of datasets with lines of business, particularly around a project or program need. Experience with conflict resolution techniques, knowledge of diverse research practices and low-code platform programming skills are also preferred.

A Customer Experience Analyst should be fluent in one or more data manipulation languages as well as statistical methods, regression modeling and predictive analytics and a passion for customer experience. Knowledge in behavioral data analysis preferred.

Experience

This Classification must have a minimum of two (2) years in a technical or functional consulting or research role or other relevant industry experience. Experience presenting to clients or other decision makers to lay out and advance ideas to various audiences (technical and non-technical).

And Education

This classification requires a bachelor's degree. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**42)Information Technology Expert**

An IT Expert is a person who has comprehensive and authoritative knowledge, abilities or skills through extensive practice and/or education in a particular IT area not found in any of the above Classifications. Examples may include, but not limited to, geospatial specialties, business intelligence experts, specialized data analytics. Qualifying experience and education, determined by User Agencies, are at the highest, specialized level. Contractor must provide objective measures of expertise, which may include but are not limited to unique credentials, patents, research and publication history, etc.

## **EXHIBIT B – BUDGET DETAIL AND PAYMENT PROVISIONS**

### **1. BUDGET CONTINGENCY**

It is mutually agreed that if the State Budget Act of the current year and/or any subsequent years covered under this Contract does not appropriate sufficient funds for the program, this Contract shall be of no further force and effect. In this event, the State shall have no liability to pay any funds whatsoever to the Contractor or to furnish any other considerations under this Contract and the Contractor shall not be obligated to perform any provisions of this Contract.

### **2. INVOICES**

#### **a. Submission of Invoices**

The Contractor shall submit itemized invoices to the User Agency contact person at the address contained in the User Agreement. Invoices should include:

- i. DGS MSA Contract Number
- ii. User Agency Contract Number
- iii. User Agency Order Number
- iv. User Agency Billing Code
- v. User Agency Name
- vi. User Agency Address
- vii. Description of services ordered
- viii. Pricing information, which shall not exceed rates on the Cost Proposal.

b. The User Agency contact person will verify and approve, or disapprove, the invoiced items. If the User Agency does not approve the invoiced items, the invoice will be disputed and returned to the Contractor for correction.

#### **c. Billing Options:**

The User Agency using this MSA may have unique billing needs. The Contractor shall work with the User Agency to provide the agency with a billing system that meets the agency's needs.

### **3. RATES**

The hourly rates specified in each contractor's MSA are the maximum hourly rates to be charged to User Agencies, refer to Exhibit B.1 - Rate Sheet. Lower rates are encouraged when responding to a User Agency's Request for Offer (RFO). All rates shall be firm fixed for the MSA term, including any optional year extensions, unless MSA rates are amended in a rate adjustment (refer to Section 7, Rate Adjustments).

### **4. TRAVEL**



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User Agencies, as applicable, may allow additional travel reimbursement which must be itemized separately on the User Agreement. The contractor must have prior approval by the User Agency for additional travel reimbursement.

**5. PAYMENT**

Payment for services performed under this Contract will be made upon satisfactory completion of services rendered. The Contractor shall invoice User Agencies in arrears upon successful completion of services. Invoices for services are not due and payable, and do not constitute an obligation of the User Agency, until the month following the month for which charges are accrued.

**6. PROMPT PAYMENT CLAUSE**

Payment will be made in accordance with, and within the time specified in Government Code Chapter 4.5, commencing with Section 927.

**7. RATE ADJUSTMENTS**

All Classification rates shall be firm fixed for the MSA term, including any optional year extensions, unless a rate adjustment is granted no more than once annually in accordance with the following guidelines.

- a. Rate adjustments will not be made during the first year of the awarded MSA.
- b. Calculation of a rate adjustment shall be based on a Consumer Price Index (CPI), involving an annual percent change to the CPI.
- c. Agreement of CPI Adjustment:

The Contractor is solely responsible for notifying the DGS-PD via email to the TDDC mailbox of a CPI rate change, utilizing the March CPI, which is released on April 10, using the annual rate calculated by the Bureau of Labor Statistics and to submit this notification no earlier than April 10th and no later than June 1st. Requests for rate adjustments will be reviewed in the order they are received. The Contractor shall provide a copy of the index and other supporting documentation necessary to support the increase or decrease to the DGS-PD. The subject line of the email request must contain "Request for CPI Adjustment". In the event of a CPI rate increase, should the Contractor fail to make a request and submit supporting documentation to the DGS-PD within the timeframe noted above, the Contractor shall be deemed to have waived its right to any increase in rate for that year. However, the State shall not be barred from making the appropriate adjustment in the case of a decrease in rate as determined in accordance with the above methodology.

Any rate increases shall not be effective until an amendment is executed. Existing User Agreements shall be honored at the same rates, terms and conditions.

## **EXHIBIT C – IT GENERAL PROVISIONS (DGS-PD 401IT)**

The Information Technology (IT) General Provisions (DGS-PD 401IT) can be viewed at:  
(<https://www.dgs.ca.gov/-/media/Divisions/PD/PTCS/OPPL/Model-Language/IT/ITGeneralProvisions11192021.docx?la=en&hash=1333CDCE673BA36829779048AF8B233AF70081BE>).

## **EXHIBIT D – INSURANCE REQUIREMENTS**

During the RFO process, a User Agency may include additional terms and conditions including but not limited to insurance requirements such as Workers' Compensation and Employer's Liability, and Professional Liability.

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

Department: MUNICIPAL TRANSPORTATION AGENCYDept. Code: MTAType of Request:  Initial  Modification of an existing PSC (PSC # 49604 - 18/19)Type of Approval:  Expedited  Regular  Annual  Continuing  (Omit Posting)Type of Service: As-Needed Specialized Engineering ServicesFunding Source: Fund: Federal, Local, Grants (State)PSC Original Approved Amount: \$9,000,000PSC Original Approved Duration: 06/01/19 - 05/31/26 (7 years 1 day)PSC Mod#1 Amount: \$3,000,000PSC Mod#1 Duration: 06/01/26-02/28/27 (39 weeks 1 hour)PSC Cumulative Amount Proposed: \$12,000,000PSC Cumulative Duration Proposed: 7 years 39 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The engineering consultant will provide support to the delivery of capital projects in the Intelligent Transportation system. The scope of consultant support includes but is not limited to:

- Plan, design, review, and construction management support of Digital systems that support the transportation business of the agency;
- Assist in the preparation of procurement contracts for software and hardware components, including product research, integration criteria, and performing alternative analyses;
- Prepare project management plan in accordance with FTA requirements; preparing QA oversight, audit plans, training;
- Perform special testing and inspection, cost analyses of contracts, change orders, task orders, and contract modification;
- Perform geotechnical investigation and reports;
- Perform system engineering related work;
- Perform start-up and commissioning of system processes;
- Provide safety certification oversight and required documentation;
- Other tasks related to system engineering and cost engineering support.

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

The services to be performed require highly specialized knowledge and various technology expertise not otherwise available in house. Due to the time-sensitivity of technology projects which may directly or indirectly impact the delivery of Intelligent Transportation System capital projects, we believe it is reasonable and necessary to request contractors to fill such needs. In some instances, due to the proprietary nature of certain software systems, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits. Replacement software and hardware, as well as specialized technical assistance on testing and commissioning upgrades to the system, must be contracted through the provider of the application and there are no applicable civil service classes who can perform this work. In certain circumstances, per regulation requirement, we must hire independent third-party services to perform review and inspection. Denial of this service will delay capital project delivery approved by the MTA Board set forth by the agency's Capital Improvement Program and negatively impact our capital project delivery performance. In instances where independent review and inspection services are required, denial of the service will prevent project acceptance and completion.

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.

No

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 initial request for 7 years term to cover as-needed specialized engineering support needs based on the capital project schedule.

## 2. Reason(s) for the Request

A. Display all that apply

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

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).

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

Explain the qualifying circumstances:

We seek professional services for Intelligent Transportation System capital projects that require highly specialized knowledge and various technology expertise not otherwise available in-house. The short duration of such projects would not make it feasible to conduct hiring through the civil service process. Due to the time-sensitivity of such projects which may directly or indirectly impact

the agency's daily operations and delivery of services to the public, we believe it is reasonable and necessary to hire contractors to fill such needs. We may also require independent reviews and inspections services per funding requirement or government regulation. Every reasonable attempt will be made to transition this work back to the City through the civil service hiring process if deemed appropriate and resources are available. In some instances, due to the proprietary nature of certain software systems, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits. Replacement software and hardware, as well as specialized technical assistance on testing and commissioning upgrades to the system, must be contracted through the provider of the application and there are no applicable civil service classes who can perform this work.

B. Reason for the request for modification:

Increasing PSC amount to a total of \$12,000,000 and updating proposed start date from 6/1/2019 to 3/1/2020 for the as-needed specialized engineering support needs to be based on capital and operating projects.

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

- A. Specify required skills and/or expertise: The professional services we seek are necessary to assist with the timely completion of technology projects, including but not limited to, initial planning and programming, specialized analytical studies, construction support and management, start-up and operations planning, installing, configuring, testing, validating, and providing training and maintenance for various software and hardware used by the agency, as well as developing and implementing technology related processes and solutions. In general, we seek technology expertise in Digital systems that support the transportation business of the agency and the delivery of capital projects in the Intelligent Transportation System.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer; 5502, Project Manager 1; 5504, Project Manager 2; 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?**

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
No, due to the immediate need for highly specialized skills for projects with a short duration, there are no applicable civil service classes that can perform the work. In some cases, due to the proprietary nature of the software system, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, due to the temporary need for

services to assist with the completion of short-term ad-hoc projects, it is not practical to adopt a new civil service class to perform the highly specialized nature of the work defined by each project manager.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Depending on the scope of work defined by each project manager, the contractor will train City employees in their area of technology expertise to enhance and streamline current technology processes and solutions. Project managers will ensure that the contractors provide the proper cross-training and documentation to engineers and business analysts. The length of training varies depending on the scope of work, anywhere from a week up to several months.
- 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 08/14/19, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21;

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

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

Address: 1 South Van Ness, San Francisco, CA 94103

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49604 - 18/19

DHR Analysis/Recommendation:  
Commission Approval Not Required  
Approved by DHR on 08/27/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: As-Needed Specialized Engineering Services

Funding Source: Fund: Federal, Local, Grants (State)

PSC Amount: \$9,000,000

PSC Est. Start Date: 06/01/2019

PSC Est. End Date  
05/31/2026

**1. Description of Work**

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

The engineering consultant will provide support to the delivery of capital projects in the Intelligent Transportation system. The scope of consultant support includes but is not limited to:

- Plan, design, review, and construction management support of Digital systems that support the transportation business of the agency;
- Assist in the preparation of procurement contracts for software and hardware components, including product research, integration criteria, and performing alternative analyses;
- Prepare project management plan in accordance with FTA requirements; preparing QA oversight, audit plans, training;
- Perform special testing and inspection, cost analyses of contracts, change orders, task orders, and contract modification;
- Perform geotechnical investigation and reports;
- Perform system engineering related work;
- Perform start-up and commissioning of system processes;
- Provide safety certification oversight and required documentation;
- Other tasks related to system engineering and cost engineering support.

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

The services to be performed require highly specialized knowledge and various technology expertise not otherwise available in house. Due to the time-sensitivity of technology projects which may directly or indirectly impact the delivery of Intelligent Transportation System capital projects, we believe it is reasonable and necessary to request contractors to fill such needs. In some instances, due to the proprietary nature of certain software systems, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits. Replacement software



and hardware, as well as specialized technical assistance on testing and commissioning upgrades to the system, must be contracted through the provider of the application and there are no applicable civil service classes who can perform this work. In certain circumstances, per regulation requirement, we must hire independent third-party services to perform review and inspection. Denial of this service will delay capital project delivery approved by the MTA Board set forth by the agency's Capital Improvement Program and negatively impact our capital project delivery performance. In instances where independent review and inspection services are required, denial of the service will prevent project acceptance and completion.

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

We have established project level professional services contracts to acquire specialized engineering support based on individual project needs. This contract will be a task order contract to support the program of capital projects as specified in the agency's FY19-23 Capital Improvement Program as a commitment to the public in delivery technology projects.

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.

Initial Contract term of 3 years with options to extend 2 terms of 2 years each to cover as - needed specialized engineering support needs based on the capital project schedule.

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

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

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

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).

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

B. Explain the qualifying circumstances:

We seek professional services for Intelligent Transportation System capital projects that require highly specialized knowledge and various technology expertise not otherwise available in-house. The short duration of such projects would not make it feasible to conduct hiring through the civil service process. Due to the time-sensitivity of such projects which may directly or indirectly impact the agency's daily operations and delivery of services to the public, we believe it is reasonable and necessary to hire contractors to fill such needs. We may also require independent reviews and inspections services per funding requirement or government regulation. Every reasonable attempt will be made to transition this work back to the City through the civil service hiring process if deemed appropriate and resources are available. In some instances, due to the proprietary nature of certain software systems, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits. Replacement software and hardware, as well as specialized technical assistance on testing and commissioning upgrades to the system, must be contracted through the provider of the application and there are no applicable civil service classes who can perform this work.

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

- A. Specify required skills and/or expertise: The professional services we seek are necessary to assist with the timely completion of technology projects, including but not limited to, initial planning and programming, specialized analytical studies, construction support and management, start-up and operations planning, installing, configuring, testing, validating, and providing training and maintenance for various software and hardware used by the agency, as well as developing and implementing technology related processes and solutions. In general, we seek technology expertise in Digital systems that support the transportation business of the agency and the delivery of capital projects in the Intelligent Transportation System.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer; 5502, Project Manager 1; 5504, Project Manager 2; 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?**

We seek professional services for IT projects that require highly specialized knowledge and various technology expertise not otherwise available in house. The short duration of such projects would not make it feasible to conduct hiring through the civil service process. In some instances, due to the proprietary nature of certain software systems, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits. Replacement software and hardware, as well as specialized technical assistance on testing and commissioning upgrades to the system, must be contracted through the provider of the application and there are no applicable civil service classes who can perform this work.

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

A. Explain why civil service classes are not applicable.

No, due to the immediate need for highly specialized skills for projects with a short duration, there are no applicable civil service classes that can perform the work. In some cases, due to the proprietary nature of the software system, City personnel do not have access to the trade-secret software source code or design of specialized electronic circuits.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, due to the temporary need for services to assist with the completion of short-term ad-hoc projects, it is not practical to adopt a new civil service class to perform the highly specialized nature of the work defined by each project manager.

**6. Additional Information**

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

No.

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

Yes. Depending on the scope of work defined by each project manager, the contractor will train City employees in their area of technology expertise to enhance and streamline current technology processes and solutions. Project managers will ensure that the contractors provide the proper cross-training and documentation to engineers and business analysts. The length of training varies depending on the scope of work, anywhere from a week up to several months.

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 02/01/2019, the Department notified the following employee organizations of this PSC/RFP request:

Prof & Tech Eng, Local 21

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

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

Address: 1 South Van Ness San Francisco, CA 94103

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49604 - 18/19

DHR Analysis/Recommendation:

action date: 04/01/2019

Commission Approval Required

Approved by Civil Service Commission

04/01/2019 DHR Approved for 04/01/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PORT--PRT

Dept. Code: PRT

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

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

Type of Service: Environmental and Planning Professional Services

Funding Source: Port Operating Budget

PSC Duration: 4 years

PSC Amount: \$7,500,000

**1. Description of Work**

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

The Port requires the expertise of qualified consultants capable of providing environmental and related professional services on an as-needed basis. Requested services may involve an entire project, several projects, and part of a project or for any project phase. Consultants who are awarded contracts under this RFQ may be expected to work in conjunction with the Port's technical staff and/or other consultants hired by the Port as part of a project team.

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

Short-term, specialized assistance necessary for Port staff to efficiently perform required environmental functions and to comply with regulatory requirements in a timely manner. These regulations are designed to improve the health and wellbeing of the residents, workers, and visitors in San Francisco and also to protect the San Francisco Bay and its natural habitat and ecology. The very nature of the Port's aging infrastructure and deferred maintenance coupled with continuously evolving Federal, State, and local environmental regulations and requirements creates a situation of many unanticipated and urgent projects which require immediate attention. The timing requirement for meeting those urgent projects make it necessary for the Port to contract with consultants, on an as-needed basis, to provide the required environmental services in a timely manner. Denial of this PSC will mean the Port may not be able to complete the environmental reviews and project necessary for it to effectively plan and manage its assets and activities. Denial of this PSC may also subject the Port to repeated notices of violations of relevant regulations.

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 authorized under PSC#48682 – 18/19. Due to an increase in the number of ongoing Port projects and in the amount of environmental regulatory changes, the Port has almost expended all the funds approved for the as-needed contracts that were issued under that PSC.

D. Will the contract(s) be renewed?

The Port may seek to renew the contract if the services are still needed at the end of the current contract term.

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

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

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

Short-term or capital projects requiring diverse skills, expertise and/or knowledge. The various service tasks that will be required under this PSC will be short-term tasks that will require extensive and specialized skills and experience from experts in different areas of environmental management profession. Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload). The various service tasks that will be required under this PSC will be sporadic and intermittent, depending on the needs of each project. The services will only be used when they are needed to augment Port's resources or when the Port does not have available resources to perform the tasks. Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator). Some of the services that will be required under this PSC will require resources that are not available within the City for instances laboratories for testing samples, dredging equipment, hazardous waste abatement and transportation equipment.

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

- A. Specify required skills and/or expertise: Knowledge, ability, and demonstrated experience in specialized environmental services including but not limited to (i) environmental review, characterization, permitting and compliance, (ii) air, soil, storm and groundwater sampling, analysis, and remediation; (iii) hazardous materials characterization and management; (iv) industrial hygiene and analytical services; (v) climate change, sustainability, and energy-efficiency planning; (vi) terrestrial and marine biology; (vii) noise assessment; and (viii) federal, state, and local environment laws and regulations.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5291, Planner 3; 5305, Materials Testing Technician; 5602, Utility Specialist; 5620, Regulatory Specialist; 6137, Assistant Industrial Hygienist; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide all facilities and equipment required to perform the services. These range from laboratories for soil and materials testing to equipment for drilling and dredging.

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

There are no available resources within the City to perform the services because they do not fall within the scope of existing civil service classifications. The services are not available from City staff because the services are both highly specialized, require extensive training and experience, and are only used

occasionally. The as-needed contracts cover a large breadth of scope related to environmental and planning work.

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

- A. Explain why civil service classes are not applicable.  
Some of the disciplines required in environmental investigation, management, and compliance are beyond the scope of specific civil service classifications. The services that will be requested under this PSC will be intermittent as needed and will not require long term, full-time service. The type and quantity of services will be determined by the scope of each project which cannot be fully determined at this time.
  
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class. The work that will be requested under this PSC will cover a wide breadth of specialty work that will be intermittent, of short duration, one-time, and involve many different areas of professional expertise. It will therefore not be practical for the City to hire staff on a permanent, full time basis for the services.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
  
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
No. No, because it does not serve the City best to have its employees train to develop a unique expertise that requires significant education, specialized experience, and in some cases, professional licenses, for work that the City needs infrequently.
  
- 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 09/15/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Management & Superv 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: Alysabeth Alexander-Tut Phone: 415-274-0558 Email: alysabeth.alexander-tut@sfport.com

Address: Pier 1 San Francisco, CA

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42304 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022



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

## Choi, Suzanne (HRD)

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**From:** dhr-psccordinator@sfgov.org on behalf of alysabeth.alexander-tut@sfport.com  
**Sent:** Thursday, September 15, 2022 2:01 PM  
**To:** Alexander Tut, Alysabeth (PRT); Laxamana, Junko (DBI); amakayan@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; l21pscreview@ifpte21.org; Alexander Tut, Alysabeth (PRT); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42304 - 22/23

RECEIPT for Union Notification for PSC 42304 - 22/23 more than \$100k

The PORT -- PRT has submitted a request for a Personal Services Contract (PSC) 42304 - 22/23 for \$7,500,000 for Initial Request services for the period 01/02/2022 – 01/01/2026. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19162> 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: PORT--PRT

Dept. Code: PRT

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

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

Type of Service: Environmental and Related Professional Services

Funding Source: Port Operating Budget

PSC Amount: \$6,000,000

PSC Est. Start Date: 07/01/2019

PSC Est. End Date  
06/30/2023

**1. Description of Work**

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

Environmental and related professional services to assist in meeting the environmental and regulatory requirements associated with Port's capital project planning, development, property management, maintenance, and maritime operations.

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

Short-term, specialized assistance necessary for Port staff to efficiently perform required environmental functions and to comply with regulatory requirements in a timely manner. These regulations are designed to improve the health and wellbeing of the residents of, and visitor so San Francisco and also to protect the San Francisco Bay and its natural habitat and ecology. The very nature of the Port's aging infrastructure and deferred maintenance coupled with continuously evolving Federal, State, and local environmental regulations and requirements creates a situation of many unanticipated and urgent projects which require immediate attention. The timing requirement for meeting those urgent projects make it necessary for the Port to contract with consultants, on an as-needed basis, to provide the required environmental services in a timely manner. Denial of this PSC will mean the Port may not be able to complete the environmental reviews and project necessary for it to effectively plan and manage its assets and activities. Denial of this PSC may also subject the Port to repeated notices of violations of relevant regulations.

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 authorized under PSC#49797 – 16/17 (copy attached herewith). Due to an increase in the number of ongoing Port projects and in the amount of environmental regulatory changes, the Port has almost expended all the funds approved for the as-needed contracts that were issued under that PSC.

D. Will the contract(s) be renewed?

The Port may seek to renew the contract if the services are still needed at the end of the current contract term.

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

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

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

Short-term or capital projects requiring diverse skills, expertise and/or knowledge. •The various service tasks that will be required under this PSC will be short-term tasks that will require extensive and specialized skills and experience from experts in different areas of environmental management profession. Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload). •The various service tasks that will be required under this PSC will be sporadic and intermittent, depending on the needs of each project. The services will only be used when they are needed to augment Port’s resources or when the Port does not have available resources to perform the tasks. Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator). •Some of the services that will be required under this PSC will require resources that are not available within the City for instances laboratories for testing samples, dredging equipment, hazardous waste abatement and transportation equipment.

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

- A. Specify required skills and/or expertise: Knowledge, ability, and demonstrated experience in specialized environmental services including but not limited to (i) environmental review, characterization, permitting and compliance, (ii) air, soil, storm and groundwater sampling, analysis, and remediation; (iii) hazardous materials characterization and management; (iv) industrial hygiene and analytical services; (v) climate change, sustainability, and energy-efficiency planning; (vi) terrestrial and marine biology; (vii) noise assessment; and (viii) federal, state, and local environment laws and regulations.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5291, Planner 3; 5305, Materials Testing Technician; 5602, Utility Specialist; 5620, Regulatory Specialist; 6137, Assistant Industrial Hygienist; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide all facilities and equipment required to perform the services. These range from laboratories for soil and materials testing to equipment for drilling and dredging.

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

There are no available resources within the City to perform the services because they do not fall within the scope of existing civil service classifications. The services are not available from City staff because the services are highly specialized, require extensive training and experience, and are only used occasionally.

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

A. Explain why civil service classes are not applicable.

Some of the disciplines required in environmental investigation, management, and compliance are beyond the scope of specific civil service classifications. The services that will be requested under this PSC will be intermittent as needed and will not require long term, full-time service. The type and quantity of services will be determined by the scope of each project which cannot be fully determined at this time.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class. The work that will be requested under this PSC will be specialty work that will be intermittent, of short duration, one-time, and involve many different areas of professional expertise. It will therefore not be practical for the City to hire staff on a permanent, full time basis for the 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. It is not anticipated that Port employees will perform the work so there is no need to train them.

C. Are there legal mandates requiring the use of contractual services?

No.

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

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

No.

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

No.

**7. Union Notification:** On 04/23/2019, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Management & Superv 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: Lavena Holmes Phone: 415-274-0305 Email: lavena.holmes@sfport.com

Address: Pier 1, Embarcadero San Francisco, CA 94111

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 48683 - 18/19

DHR Analysis/Recommendation:

action date: 07/15/2019

Commission Approval Required

Approved by Civil Service Commission

07/15/2019 DHR Approved for 07/15/2019

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: Project Administration/ Project Management

Funding Source: SFPUC Water Enterprise

PSC Duration: 4 years 1 day

PSC Amount: \$30,000,000

**1. Description of Work**

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

Work will consist of technical and project management services in all aspects required for expansion of an existing reservoir accomplished by raising a dam by over 50 feet. The increased reservoir storage will provide regional storage to benefit to 8 Bay Area and Central Valley water agencies.

Activities include planning, permitting and design work related to construction of a surface water dam and a 14 mile conveyance pipeline that will enable delivery of water to California State Water Project infrastructure at the California Aqueduct. Operational and hydraulic modeling, regulatory permitting, facility design for Los Vaqueros dam and Transfer Bethany Pipeline, natural resources services, project management services, asset management services, land acquisition and management services, security and emergency response services, environmental and regulatory compliance services.

The SFPUC's Alternative Water supplies staff are involved in the planning of the project. SFPUC staff at the Water Enterprise work closely in collaboration with other agencies to provide, engineering, financial, and communication direction and support for the project. In addition, the SFPUC's Assistant General Manager for Water and General Manager serve on the JPA Board of Directors.

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

In dry years when the SFPUC needs to augment its water supplies, water could be sourced from the Los Vaqueros Reservoir Expansion to reduce the supply shortfall and water service rationing for the SFPUC customers. If the SFPUC is unable to secure sufficient water resources to meet demands, it could cause significant health, safety, and economical challenges for the 2.7 million customers who depend on our 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.  
No. This is an initial request.

D. Will the contract(s) be renewed?  
No



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

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

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

- 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).

- B. Explain the qualifying circumstances:

The work is short-term and highly specialized which means that it will be needed to fulfill those short-term needs in capital projects or technical needs on other projects that arise on an as-needed basis. There are also regulatory requirements or audits (eg. Financial Audits) that require a third-party to assess or provide comment on, and that will be provided by these services.

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

- A. Specify required skills and/or expertise: This project requires combined specialized and technical skills such as legal, financial services, and operations, including but not limited to 1) preparation and execution of agreements that outline each member's benefits from the project and the compensation to be made for the benefits received, 2) financial evaluation that will assess the costs and merits of the Project and present a Plan of Finance, and 3) Multi party, multi beneficiary water utility operations and management including hydrological modeling and coordinated operations with State Water Project and Federal Central Valley Project. Additionally, regulatory compliance, engineering and design, and Public Relations skills such as 1) Regulatory compliance and permitting, water rights permitting and change petitions, 2) final design on facilities and design efforts related the Los Vaqueros Dam expansion to gain Division of Safety of Dams (DSOD) authorization to construct, dam dewatering plan and specifications, and 3) Public outreach to educate and inform the media, elected officials, CCWD ratepayers, communities in the Los Vaqueros area, environmental organizations, and regional and statewide interests about the purpose, objectives, and results of the technical studies are required to complete the project work.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5148, Water Operations Analyst; 5211, Eng/Arch/Landscape Arch Sr; 5602, Utility Specialist; 5620, Regulatory 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, the project infrastructure belongs to Contra Costa Water District and the work done will be under the jurisdiction of Contra Costa County, and outside of the jurisdiction of San Francisco.

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

A. Explain why civil service classes are not applicable.

This work is done under the jurisdiction of another water agency located in Contra Costa County. The project is short-term, and the work is highly technical and requires highly specialized staff with prior experience. The work under the Los Vaqueros Joint Powers authority (a third party) is required to maintain public transparency for the processes and financial aspects of the project. For these reasons, it is not appropriate for San Francisco civil service staff to perform the work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it would not be practical to adopt a new civil service class to perform this work because it is performed by another water agency for a relatively short-term, technical and highly specialized work.

**6. Additional Information**

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

No.

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

No. No. Training is not a part of this PSC because of the short-term and highly specialized work that it will consist of.

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 09/15/2022, the Department notified the following employee organizations of this PSC/RFP request:

Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sflower.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41620 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgov.org](mailto:shale@sfgov.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [seichenberger@local39.org](mailto:seichenberger@local39.org); [MRainsford@local39.org](mailto:MRainsford@local39.org); [grojo@local39.org](mailto:grojo@local39.org); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 41620 - 22/23  
**Date:** Thursday, September 15, 2022 11:27:57 AM

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

RECEIPT for Union Notification for PSC 41620 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 41620 - 22/23 for \$30,000,000 for Initial Request services for the period 12/31/2022 – 12/31/2026. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19173> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Emergency Planning, Response, Training, and Technical Support

Funding Source: SFPUC Water Enterprise

PSC Duration: 4 years

PSC Amount: \$30,000,000

**1. Description of Work**

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

The SFPUC requests to solicit the services of a consultant to provide and support ongoing emergency preparedness, response, and support activities to all SFPUC enterprises and divisions. Specifically: Incident Command System (ICS) training under the National Incident Management System (NIMS) to SFPUC employees, updates to Field Operations Guides (FOG's) and Emergency Operations Plans (EOP's), assistance with the creation of an emergency drinking water distribution plan (in conjunction with DEM and other city partners), and other related emergency planning and response services to the SFPUC as needed. Consultant would additionally coordinate any needed updates of existing Divisional EOPs into the general EOP as necessary; and ensure that comments, corrections and editing discussed in after action report/post exercise briefings are incorporated into the EOP, DEOP, and/or FOG, as necessary and/or as prescribed. Consultant would work with SFPUC Emergency Planning and Security (EPS) team to strategize on how to update complex EOP documents, targeted at producing specific checklists for actionable emergency response for operating divisions and front line staff. Consultant would also work with EPS Team to design, coordinate, and conduct multi-divisional emergency response exercises to build upon smaller division specific exercises already being delivered by EPS team.

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

Consultant support is necessary to support the Emergency Planning team and Division and Bureau staff in emergency response training and exercise coordination to address a multitude of emergencies the agency could face. SFPUC staff and facilities span across many counties, with varying needs and resources available to support emergency preparedness and response. The EPS team and SFPUC as a whole request consultant support to augment staff time and realize continual improvements in emergency preparedness and response due to the number of Divisions and Bureaus we are expected to support. Not being able to have support on emergency training, exercises and general planning would decrease the agency's ability to respond and recover from emergencies.

**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 45752 - 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.  
N/A

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

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

- Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

- B. Explain the qualifying circumstances:

Consultant support is needed to deliver SFPUC staff emergency training, exercise and emergency plan update support. In addition, unpredictable circumstances could arise which can necessitate further need for additional training and expertise. EPS team can easily be pulled in multiple directions, and workload is always high. Recent events and increased emergency environment (COVID, wildfires, drought) require not only SFPUC staff, but qualified consultant support to ensure SFPUC staff are as prepared as possible to ensure staff safety and continue to deliver critical services to our customers.

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

- A. Specify required skills and/or expertise: Qualified consultants would need to have proven expertise and extensive experience in emergency management systems as based on NIMS and the Standardized Emergency Management System (SEMS), training and exercises as based on the Homeland Security Exercise Evaluation Program (HSEEP), providing ICS training, and in working with large utilities to develop, update and exercise emergency plans. Consultant would also need to be able to support immediate training needs or plan development or updates in response to SFPUC needs to support staff safety when carrying out operations.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5291, Planner 3; 8602, Emergency Services Coord II;
- 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 Emergency Planning and Security hired a Training and Exercise Planner (5291) in 2018. This position is crucial in managing overall training and exercise program. Consultant support is needed to provide specialized ICS training, perform plan updates, and support complex planning efforts for SFPUC Divisions and Bureaus, and address emergency response support needs that may not be easily anticipated.

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

A. Explain why civil service classes are not applicable.

Certain Incident Command Courses (ICS 300 and ICS 400) are required to be delivered by a certified trainer with vast incident response experience. No Civil Service staff are certified to provide this training. Typically certified trainers have a fire service background, responding to and leading complex incidents and emergencies. There is also a need for technical support in updating emergency operations plans, requiring a strong engineering aptitude and familiarity with water and wastewater systems.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. I believe the variance in the scope of work would make it difficult for one position to support this as a whole. Plan updates necessitate a strong engineering background and familiarity with state/federal regulations; emergency exercise and training necessitate a strong background in emergency response and training. As mentioned before, the large number of staff and specific needs from SFPUC enterprises and divisions require support to establish and maintain momentum in our emergency planning and response readiness.

**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. Incident Command System Training. Hours are difficult to approximate, but over the course of 4 years are estimated to reach 3,000 hours total. Staff receiving training would be various engineers, managers, operators, field staff, accountants, administrative analysts, utility analysts, etc.

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 09/22/2022, 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 8th Floor San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42270 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgov.org](mailto:shale@sfgov.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42270 - 22/23  
**Date:** Thursday, September 22, 2022 9:40:56 AM

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RECEIPT for Union Notification for PSC 42270 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42270 - 22/23 for \$30,000,000 for Initial Request services for the period 11/21/2022 – 11/20/2026. 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/19211> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

# **Additional Attachment(s)**

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

Department: PUBLIC UTILITIES COMMISSIONDept. Code: PUCType of Request:  Initial  Modification of an existing PSC (PSC # 45752 - 13/14)Type of Approval:  Expedited  Regular  Annual  Continuing  (Omit Posting)Type of Service: Emergency Training Services (CS-366)Funding Source: SFPUC Emergency Planning FundsPSC Original Approved Amount: \$2,000,000 PSC Original Approved Duration: 06/02/14 - 06/30/18 (4 years 4 weeks)PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/18-01/25/21 (2 years 30 weeks)PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 01/26/21-01/25/23 (2 years)PSC Cumulative Amount Proposed: \$2,000,000 PSC Cumulative Duration Proposed: 8 years 34 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The following will be provided to various San Francisco Public Utilities Commission (SFPUC) divisions/entities: General and position specific Incident Command System (ICS) training under National Incident Management System (NIMS), Table Top Training Exercises semi-annually, Full Functional Training Exercises bi-annually, Preparation of Summary of Training and Comments (After Action Reports), Revise/Update Emergency Operating Procedures and Field Operations Guides as necessary, assistance with the development of an alternative emergency drinking water plan, and general project management.

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

SFPUC divisions need to be trained in ICS procedures under NIMS per Federal Emergency Management Agency (FEMA) regulations; failure to do so could impede SFPUC's ability to receive proper reimbursement from FEMA in the event of a significant emergency/catastrophic event. Training will prepare SFPUC to act swiftly and efficiently and will solidify proper lines of communication. Revising and updating Emergency Operating Procedures is imperative, and failure to do so may result in out of date procedures that could adversely affect emergency response efforts. An alternate emergency drinking water plan is necessary to solidify processes in the event of interruption in water delivery.

**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 45752 - 13/14

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

Not sure at this point.

- 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 extends beyond five years because the emergency planning team is still refining the process of working with division managers to identify SFPUC staff who would have critical emergency responder roles. Consultants will help design and deliver training. Additionally, consultants are helping with emergency plan updates, which we need more time to execute.

## 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:

SFPUC divisions need to be trained in ICS procedures under NIMS per Federal Emergency Management Agency (FEMA) regulations; failure to do so could impede SFPUC's ability to receive proper reimbursement from FEMA in the event of a significant emergency/catastrophic event. Training will prepare SFPUC to act swiftly and efficiently and will solidify proper lines of communication. Revising and updating Emergency Operating Procedures is imperative, and failure to do so may result in out of date procedures that could adversely affect emergency response efforts. An alternate emergency drinking water plan is necessary to solidify processes in the event of interruption in water delivery.

- B. Reason for the request for modification:

There are outstanding projects which need more time to complete. Infrastructure Bureau Emergency Operations Plan, as needed Training and Exercise Support (across all divisions and enterprises), Power Enterprise Emergency Operations Plan update, and additional support as requested.

## 3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Proven expertise and extensive experience in emergency management systems as based on NIMS and Standardized Emergency Management System (SEMS), training and exercises as based on Homeland Security Exercise and Evaluation Program (HSEEP), providing ICS training, working with large utilities, developing and updating Department Emergency Operating Procedures (DEOP's), and coordinating with multiple city agencies and members of the community to develop new emergency plans.
- 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.

Lack expertise in coordinating and spearheading complex plans and projects involving such a wide range of entities. Vast experience in providing ICS training is also essential to executing this project, as is collaboration with community members and organizations. The need to contract out was based on the special skills and expertise required to perform these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No classes currently exist.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Safety Training for various classes, 200-400 employees, approximately 3 hours per employee. Employees will not be trained to be safety trainers.

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.  
AECOM Technical Services Inc

**7. Union Notification:** On 10/15/20, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45752 - 13/14

DHR Analysis/Recommendation:

Commission Approval Not Required  
Approved by DHR on 10/23/2020



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 45752 - 13/14)

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

Type of Service: Emergency Training Services (CS-366)

Funding Source: SFPUC Emergency Planning Funds

PSC Original Approved Amount: \$2,000,000 PSC Original Approved Duration: 06/02/14 - 06/30/18 (4 years 4 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/18-01/25/21 (2 years 30 weeks)

PSC Cumulative Amount Proposed: \$2,000,000 PSC Cumulative Duration Proposed: 6 years 34 weeks

**1. Description of Work**

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

The following will be provided to various San Francisco Public Utilities Commission (SFPUC) divisions/entities: General and position specific Incident Command System (ICS) training under National Incident Management System (NIMS), Table Top Training Exercises semi-annually, Full Functional Training Exercises bi-annually, Preparation of Summary of Training and Comments (After Action Reports), Revise/Update Emergency Operating Procedures and Field Operations Guides as necessary, assistance with the development of an alternative emergency drinking water plan, and general project management.

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

SFPUC divisions need to be trained in ICS procedures under NIMS per Federal Emergency Management Agency (FEMA) regulations; failure to do so could impede SFPUC's ability to receive proper reimbursement from FEMA in the event of a significant emergency/catastrophic event. Training will prepare SFPUC to act swiftly and efficiently and will solidify proper lines of communication. Revising and updating Emergency Operating Procedures is imperative, and failure to do so may result in out of date procedures that could adversely affect emergency response efforts. An alternate emergency drinking water plan is necessary to solidify processes in the event of interruption in water delivery.

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 is currently being provided by PSC No. 45752-13/14.

D. Will the contract(s) be renewed?

Not sure at this point.

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 extends beyond five years because the emergency planning team is still refining the process of working with division managers to identify SFPUC staff who would have critical emergency responder roles. Consultants will help design and deliver training. Additionally, consultants are helping with emergency plan updates, which we need more time to execute.

**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:

SFPUC divisions need to be trained in ICS procedures under NIMS per Federal Emergency Management Agency (FEMA) regulations; failure to do so could impede SFPUC's ability to receive proper reimbursement from FEMA in the event of a significant emergency/catastrophic event. Training will prepare SFPUC to act swiftly and efficiently and will solidify proper lines of communication. Revising and updating Emergency Operating Procedures is imperative, and failure to do so may result in out of date procedures that could adversely affect emergency

response efforts. An alternate emergency drinking water plan is necessary to solidify processes in the event of interruption in water delivery.

B. Reason for the request for modification:

To align the PSC duration with the amended contract duration because there are still projects to completed that require consultant assistance.

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

A. Specify required skills and/or expertise: Proven expertise and extensive experience in emergency management systems as based on NIMS and Standardized Emergency Management System (SEMS), training and exercises as based on Homeland Security Exercise and Evaluation Program (HSEEP), providing ICS training, working with large utilities, developing and updating Department Emergency Operating Procedures (DEOP's), and coordinating with multiple city agencies and members of the community to develop new emergency plans.

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.

Lack expertise in coordinating and spearheading complex plans and projects involving such a wide range of entities. Vast experience in providing ICS training is also essential to executing this project, as is collaboration with community members and organizations. The need to contract out was based on the special skills and expertise required to perform these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No classes currently exist.

**6. Additional Information**

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

No.

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

Safety Training for various classes, 200-400 employees, approximately 3 hours per employee. Employees will not be trained to be safety trainers.

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.

AECOM Technical Services Inc

**7. Union Notification: On 06/13/18, 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: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfgwater.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45752 - 13/14

DHR Analysis/Recommendation:

07/16/2018

Commission Approval Required

Approved by Civil Service Commission

07/16/2018 DHR Approved for 07/16/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Algaecide application in local water storage reservoirs

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

PSC Duration: 5 years

PSC Amount: \$500,000

**1. Description of Work**

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

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

The Contractor is expected to provide all labor, technical advice, written pest control recommendations,

watercraft, precision application inductor systems and GPS tracking equipment for the specified reservoir

treatment at the application rate as specified by the SFPUC. The Contractor shall document the aquatic

algaecide treatment through the use of GPS data collection equipment to record the path of the treatment

boats across the treatment areas within the specified reservoir.

Treatments, once started, shall be fully completed prior to the Contractor demobilizing from the site and

shall be performed on a 24-hour per day, 7-day per week basis.

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

follows:

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

California Environmental Quality Act.

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

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

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

The SFPUC will provide the following:

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

required by water discharge permits, if any.

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

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

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.  
PSC 4067 - 09/10

D. Will the contract(s) be renewed?  
No

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.  
The estimated amount of time it takes in order to complete all tasks required by regulation

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

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

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

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

B. Explain the qualifying circumstances:

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

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

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

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

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

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

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

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

A. Explain why civil service classes are not applicable.

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

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Current class(es) could perform this work with additional necessary certifications and training if the city also possessed the equipment and technical expertise required to do the work. Staff is currently considering options to identify both the budget and resources necessary to bring the work in-house, but as of yet, no specific timelines or classes have been identified to do the work.”.

### **6. Additional Information**

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

No.

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

**7. Union Notification:** On 09/22/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Laborers, Local 261

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42409 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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



**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgwater.org](mailto:shale@sfgwater.org)  
**To:** [Hale, Shawndrea M.; laborers261@gmail.com](mailto:Hale, Shawndrea M.; laborers261@gmail.com); [Hale, Shawndrea M.; dhr-psccordinator@sfgov.org](mailto:Hale, Shawndrea M.; dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42409 - 22/23  
**Date:** Thursday, September 22, 2022 10:36:25 AM

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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 42409 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42409 - 22/23 for \$500,000 for Initial Request services for the period 01/01/2023 – 12/31/2027. 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/19208> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4067 - 09/10)

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

Type of Service: Algaecide Application Services(CS-952; CS-238)

Funding Source: Water Enterprise Operating Budget

PSC Original Approved Amount: \$150,000 PSC Original Approved Duration: 12/08/09 - 02/26/11 (1 year 11 weeks)

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: 02/27/11-02/26/12 (1 year)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 02/27/12-08/26/12 (25 weeks 6 days)

PSC Mod#3 Amount: \$900,000 PSC Mod#3 Duration: 08/27/12-04/30/21 (8 years 35 weeks)

PSC Mod#4 Amount: \$500,000 PSC Mod#4 Duration: no duration added

PSC Cumulative Amount Proposed: \$1,650,000 PSC Cumulative Duration Proposed: 11 years 20 weeks

**1. Description of Work**

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

Specialty contractor to assist the SFPUC with the application of the sodium percarbonate algaecide (brand name PAK-27) in local source water reservoirs, including but not limited to Calaveras Reservoir, San Antonio Reservoir, Crystal Springs Reservoir and San Andreas Reservoir.

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

Treatment of Algae is to prevent taste and order issues when using surface waters such as Calaveras reservoir for drinking water. Denial of this request will prohibit the Water Supply and Treatment Division of the PUC from controlling algal growth in its local source water reservoirs, and meeting governmental requirements.

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.  
4053 - 08/09

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. Display all that apply

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

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

Explain the qualifying circumstances:

Working with chemicals from a boat is highly specialized and this is not routine work. The work, requires specialty licensing, is periodic, and may not always be required. Specialized boats, pumps, and chemical equipment are required. It's the equipment, chemical handling and training that we do not have. No current classification requires the California Department of Pesticide Regulation Applicator Licenses needed to perform the work.

B. Reason for the request for modification:

Due to the required lower level of Calaveras reservoir, weather, heat, and various other conditions the algae in both San Antonio and Calaveras reservoirs has increased. The planned shutdown of Hetchy water supply, where we had to rely on both local reservoirs, required treatment of algae in both reservoirs. The algae growth was very high this year and we had to perform multiple treatments to local reservoirs. During the last year we also had issues when treating the Hetchy supply causing us to blend in local supply water to meet regulatory requirements. This also had us treating the local reservoirs due to high use of the local source water and the high algae growth.

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

- A. Specify required skills and/or expertise: Specialized boats and equipment, and training with specific chemicals to spread algaecide in reservoirs that WSTD does not have. Applicators are required by State law to have possession of a California Department of Pesticide Regulation Applicator's License.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7215, General Laborer Supervisor 1; 7514, General Laborer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, specialized boats, pumps and chemical equipment.

**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.  
It's the equipment, chemical handling and training that we do not have. No current classification requires the California Department of Pesticide Regulation Applicator Licenses needed to perform the work.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, working with chemicals from a boat is highly specialized and this is not routine work. The work, requires specialty licensing, is periodic, and may not always be required.

**6. Additional Information**

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

**7. Union Notification: On 12/05/18, the Department notified the following employee organizations of this PSC/RFP request:  
Laborers, Local 261;**

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

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

Address: 525 Golden Gate Ave, Eighth Floor, San Francisco, CA 94103

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4067 - 09/10

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 01/03/2019

# April 16, 2012 Regular Meeting

## MINUTES

### Regular Meeting

**April 16, 2012**

**2:00 p.m.**

**ROOM 400, CITY HALL**

**1 Dr. Carlton B. Goodlett Place**

#### CALL TO ORDER

2:00 p.m.

#### ROLL CALL

President E. Dennis Normandy	Notified absence.
Vice President Kate Favetti	Present
Commissioner Scott R. Heldfond	Present
Commissioner Mary Y. Jung	Present

Vice President Kate Favetti presided.

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

**Edith Horner**, former Redevelopment Agency employee inquired on the status of a proposed rule for a "Redevelopment Agency Only Priority Eligible List" to be added to the Civil Service Commission Rules as a result of an agreement between the City, SEIU Local 1021 and IFPTE Local 21. The proposed rule would allow former employees of the RDA who were laid-off to be rehired by the City and County of San Francisco before any other outside applicant.

**Ed Warshauer**, SEIU Local 1021 requested that Item #9 on the Consent Agenda be severed.

**APPROVAL OF MINUTES**

Regular Meeting of April 2, 2012

**Action:** Adopted. (Vote of 3 to 0)

**COMMENDATION AGENDA**

0083-12-1 **Commendation for Paul Zarefsky, Deputy City Attorney for his outstanding service as General Counsel to the Civil Service Commission. (Item No. 5)**

Anita Sanchez, Executive Officer

Kate Favetti, Vice President

**Speakers:**

Commissioner Mary Jung

Paul Zarefsky, Deputy City Attorney

**Action:** Adopted. (Vote of 3 to 0)

**Note:**

Mr. Zarefsky thanked the Commission for the Commendation and stated that much of his work has been a collaborative effort of the staff of the Office of the City Attorney. It has been an honor for him to serve the Commission and he accepts the Commendation on behalf of his entire Office. He introduced Deputy City Attorney Sallie Gibson who will replace him as General Counsel to the Commission and stated that she is well qualified for the task.

**HUMAN RESOURCES DIRECTOR'S REPORT (Item No. 6)**

No report.

**EXECUTIVE OFFICER'S REPORT (Item No. 7)**

No report.

**0084-12-8 Review of request for approval of proposed personal services contracts.  
(Item No. 8)**

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4108-11/12	Art Commission	\$1,646,800	Design, fabricate and install artwork for San Francisco International Airport for new SFO construction in Terminal 3, (Boarding Areas E and F), and the new Control Tower building.	Regular	06/30/15
4109-11/12	Environment	\$60,000	The Contractor must implement an educational campaign directed to motorcycle owners in San Francisco and must perform the following functions: 1) Identify local venues, events, forums and networks conducive to reaching motorcyclists, 2) Inform DIYers of the requirement to recycle used motor oil and filters, 3) Provide specific information on disposal options, 4) Develop an incentives program to encourage proper disposal, 5) Organize and conduct person-to-person outreach and education based on demonstrated behavior change strategies, 6) Create advertisements in media that may include online sites, print and and/or broadcast media, 7) Provide any necessary materials, incentives and supporting web-based tools for behavior assessments needed to conduct successful outreach and education among motorcyclists.	Regular	12/31/12
4110-11/12	Human Resources	\$200,000	Contractor will provide technical consulting services necessary to 1) analyze the physical ability requirements for Q-2 Police Officer; 2) review the design and content of the current Q-2 physical ability examination, and revise it if necessary, based on those requirements to ensure the selection procedure is valid, and; 3) recommend a passing point on the physical ability examination component to ensure that it is valid and defensible.	Regular	12/31/14
4111-11/12	Human Resources	\$400,000	Contractor will provide web-based computer software licenses and software support for a proprietary training program for City supervisors and managers that meet the requirements of California Government Code Section 129501.1.	Regular	05/31/18
4112-11/12	Juvenile Court	\$300,000	This one-time contract, with ongoing hosting services, will seek to develop and implement a web-based case management software to assist Probation Officers in assessing and monitoring youthful offenders.	Regular	05/14/14



4113-11/12	Public Health	\$50,000,000	<p>In July 2006, the San Francisco Board of Supervisors adopted the Health Care Security Ordinance, which charged DPH with the responsibility for developing a new health access program called Healthy San Francisco. This ordinance requires DPH to "coordinate with a third party vendor to administer program operations, including basic customer services, enrollment, tracking service utilization, billing and communication with the participants." (SF Admin Code Sec. 14.2) DPH selected the San Francisco Health Plan (SFHP) as third party vendor. SFHP, operated by the Community Health Authority, is a government entity created by the City in 1994 solely to serve as a health maintenance organization to increase access to health care for low and moderate income San Franciscans. As the third party vendor for HSF, SFHP: 1) assists in eligibility and enrollment functions, 2) manages participant fee billing and collection, 3) receives utilization data and develops utilization reports, 4) communicates program information to participants, 5) handles external communications and outreach activities, 6) conducts provider network development and communication, 7) ensures reimbursement to non-DPH health care providers in network, 8) manages participation of employers and employees, 9) coordinates chronic care management/health promotion services, 10) oversees customer service, and 11) provides other administrative functions. SFHP provides similar services for SFPATH, a federally supported healthcare program for low-income adults which the Department launched in July 2011 as required under California's 1115 Medicaid Waiver.</p>	Regular	06/30/14
4114-11/12	Public Utilities Commission	\$500,000	<p>Specialized professional services to provide expert risk assessment related to naturally occurring asbestos (NOA) on the Calaveras Dam Replacement Project (CDRP) in Alameda County, CA. Services to include critical review of air monitoring data collected during construction and to make recommendations for modifications to the air monitoring methodology and/or other actions based on results.</p>	Regular	04/16/16
4106-09/10	Airport Commission	<p>Increase Amount \$5,000,000 New Amount \$7,400,000</p>	<p>Work will include providing project controls and reporting, project scheduling, project budgeting, document control, project coordination, project planning, design management and construction management services for Airport Terminal and Facility Projects. This request is for all Airport Capital Improvement Project work excluding Terminal 2. Construction Management services on this project were originally approved for \$2.4M; however, due to the increased project scope and duration of the Terminal 3, Boarding Area E Improvements Project, the Airport has increased the budget. The construction project scope now includes expanding the building's footprint by approximately 18,700 square feet and updating fixtures to code. The existing footprint of the building is approximately 48,000 square feet. Construction Management services have increased to incorporate the applicable seismic work.</p>	Modi- fication	02/01/17

4008-09/10	Public Utilities Commission	<p>Increase Amount</p> <p>\$300,000</p> <p>New Amount</p> <p>\$600,000</p>	<p>This service is necessary as an adjunct to the SFPUC SFGreasecycle program designed to reduce or eliminate grease discharges to the sewer system. This successful pilot program now provides cooking oil collection service, as well as participation in a renewable energy program, to over 600 San Francisco restaurants as well as City residents. Expansion of this program to adequately handle other organic waste streams allows for dramatic reduction in SFPUC greenhouse gas emissions while procuring "energy Rich" assets to be utilized in co-generation of our treatment plants and biodiesel for the SFPUC fleet. Without this program there is no low cost alternative for commercial enterprises to grease disposal and other incentives to eliminate grease disposal to the sewer system. Further, not expanding this program would result in reduced revenue and possible penalties.</p>	Modi- fication	07/01/15
4054-08/09	Public Utilities Commission	<p>Increase Amount</p> <p>\$15,000,000</p> <p>New Amount</p> <p>\$29,700,000</p>	<p>This modification is necessary because there are several projects (see attached list) that will require as-needed environmental services. Additional Sewer System Improvement Program (SSIP) projects, Hetch Hetchy Water and Power Improvement Program (HHIP) projects, and other capital projects will be identified during the Agreements' durations. These infrastructure improvement programs and other capital projects require additional short-term, specialized work and technical expertise to support their environmental, design, and construction management phases. Without the information and recommendations generated by this specialized expertise, these phases can be delayed or stopped; hence construction would be delayed or, if environmental permits were not obtained, disallowed.</p>	Modi- fication	03/30/18
4067-09/10	Public Utilities Commission	<p>Increase Amount</p> <p>\$900,000</p> <p>New Amount</p> <p>\$1,150,000</p>	<p>An outside specialty contractor was hired to treat the City's source water reservoirs with a new chemical (sodium carbonate peroxyhydrate) to control algal growth. Although, the City provides the chemical for the treatment, the contractor has provided the expert labor and all specialty equipment to disperse the chemical. Denial of this request will prohibit the Water Supply and Treatment Division of the PUC from controlling algal growth in its local source water reservoirs. This could lead to a violation of governmental resource agency regulations and potential water delivery shortages to the City and over 40 wholesale customers.</p>	Modi- fication	04/30/21

**Speakers:** Dave Johnson and Brent Lewis, Department of Human Resources spoke on PSC #4110-11/12.

**Action:** Adopted the report; Approved request for proposed personal services contracts. Notified the Office of the Controller and the Office of Contract Administration. (Vote of 3 to 0)

0092-12-3

Salary Survey for Registered Nurse Classifications (Charter Section A8.403), 2012-2013. (Item No. 9)

Rich David, Department of Human Resources

Susanne Paradis, Registered Nurse, Department of Public Health

Steve Ponder, Department of Human Resources

Paul Zarefsky, Deputy City Attorney

**Speakers:**

Ed Warshauer, SEIU Local 1021

Peter Finn, Teamsters Local 856

Rebecca Morrow, Registered Nurse, Department of Public Health

Liz Hewlett, Registered Nurse, Department of Public Health

Adopted the report; Certified to the Board of Supervisors the Medical Center A Staff Nurse II rate of \$69.97 is the highest prevailing wage rate in effect on April 15, 2012. (Vote of 3 to 0)

**Action:**

The Commission supported a condition to the motion added by Commissioner Heldfond that the Department of Human Resources, SEIU Local 1021 and Teamsters Local 856 work together to discuss the feasibility of a separate report on the benefits portion or a methodology for the survey.

0085-12-8

Review of request for approval of proposed personal services contract – Omit Posting. (Item No. 10)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4115-11/12	Public Defender	\$72,166	Center on Juvenile and Criminal Justice (CJCJ) youth advocate services are necessary to provide community support and monitoring to youth at their school sites, in Court, in their homes and in their communities. CJCJ will provide and intensive case management approach to promote each youth's school and community adjustment by ensuring access to appropriate educational supports. The youth advocate will work as a team with the Public Defender education attorney. The LEAP attorney is the team leader and the education youth advocate works under the daily supervision of the LEAP attorney. The youth advocate is an agent of the attorney and protected by the attorney – client privilege. While the education attorney advocates for the legal educational rights of the youth, the youth advocate ensures that an individualized service plan is developed for the youth to provide consistent and close supervision of the youth in compliance with education plans. The youth advocate will be based in the community and will work daily in the schools, interacting with school teachers, administrators, and support staff. The youth advocate will also assist the LEAP attorney in advocating for educational system's reform by conducting education workshops for parents and guardians who are the education rights holders of youth, testifying before school board hearings and meetings, and interfacing with community based agencies to improve policies and procedures that impact school success for Public Defender juvenile clients.	Regular	12/31/12

**Speakers:** Patricia Lee, Office of the Public Defender

**Action:** Adopted the report; Approved request for proposed personal services contract. Notified the Office of the Controller and the Office of Contract Administration. (Vote of 3 to 0)

0345-11-2 **Preliminary Report of Salary Survey Results: Salary Setting for Elected Officials (Mayor, City Attorney, District Attorney, Public Defender, Assessor-Recorder, Treasurer, and Sheriff) of the City and County of San Francisco for a five (5) year cycle, effective July 1, 2012 through June 30, 2017, in accordance with Charter Section A8.409-1. (Item No. 11)**

January 9, 2012: Accepted the report.

February 6, 2012: Accepted the report.

March 19, 2012: Accepted the report.

**Speakers:** Luz Morganti, Civil Service Commission

**Action:** Accepted the report. (Vote of 3 to 0)

**COMMISSIONERS' ANNOUNCEMENTS/REQUESTS** (Item No. 12)

Vice President Favetti requested the staff to look into reasons for the prices charged for the raising of the flag by the Department of Public Works according to the article in the San Francisco Examiner. She also inquired about the status of the information she requested regarding the hiring process of a Plumber Supervisor at the San Francisco Unified School District.

**ADJOURNMENT** (Item No. 13)

3:13 p.m.

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: Project Scheduling and Cost Control Staff Augmentation Services

Funding Source: SFPUC Capital Improvement Programs

PSC Duration: 10 years 2 days

PSC Amount: \$15,000,000

**1. Description of Work**

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

The scope of work includes obtain services to augment and assist SFPUC staff with specialized program/ project scheduling, Critical Path Method (CPM) scheduling, forecasting, change control, cost controls, and cost estimating for capital improvement projects and programs, review construction change orders and evaluate cost and schedule impacts, database modifications, upload/download of data from other software systems to the Primavera suite of tools used in Program Controls Group (PCG), and other specialized services such as providing technical training to staff.

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

SFPUC planned delivering \$10B of Capital Improvement projects over next 10 years. These projects are mostly bond funded. In order to successfully deliver these projects, the Program Controls Group (PCG) is building and maintaining cost and resource loaded project schedules in Primavera suite of tools. Additionally, PCG is responsible for monitoring, controlling and reporting project/ program level schedules and budgets. Manpower with expertise in scheduling, budgeting, cost control, cost estimating and database integration is required to augment SFPUC staff. Failure to meet these objectives would impact the ability of SFPUC to successfully complete major capital improvements planned to deliver over next 10 years.

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

Yes, it was provided in the past. This service has been provided by SFPUC staff and Consultant under CS 369 A&B. The PSC number (for Contract CS369A&B) is 42163-13/14.

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 term is for 10 years due to planned capital planning over next 10 years.

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

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

- Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.
- 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).
- Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible (including situations where there is grant funding).

B. Explain the qualifying circumstances:

SFPUC planned to deliver a significant capital improvements over next 10 years. It has been difficult to recruit city resources with the required specialized skill sets to perform scope of work listed in the section 1.B of this form. Consultants are needed to augment and assist SFPUC staff. The consultant will help us to meet peaks in workload. They will be released after completion of the work. Project funding will cover the consultant cost and no future funding is needed.

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

- A. Specify required skills and/or expertise: The required special skills includes Scheduling, Cost Control, Cost Estimating, Java scripts programming, Oracle/Primavera software configurations expertise, Earned Value Management project tracking and reporting and specialize in integrating data among various databases.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1052, IS Business Analyst; 1054, IS Business Analyst-Principal; 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 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?**

Consultant are needed to meet peak workload level as PUC will continue to hire a few additional City staff. Hiring consultants to augment City staff during peak workload will allow us to avoid layoffs after capital improvement projects/programs completion.

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

- A. Explain why civil service classes are not applicable.  
The civil service classes listed above (Section 2.B) is applicable. We are currently using 5602 - Utility Specialist for scheduling positions. we also hired some 5201 Junior engineers in the past and provided them trainings to perform a scheduler work assignment. This usually takes many years to bring a new hire to the required level of skill sets to perform this work. It has been difficult to recruit city resources with the required specialized skill sets to perform this work. Consultants are needed to augment and assist SFPUC staff with specialized services listed in section 1.B of this form.

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 not practical to adopt a new civil service classification. This specialized work are related to delivery of the time sensitive improvements scheduled over next 10 years. It takes too long to adopt a new Civil Service position, but we need resources to perform this work now. Additionally, after implementation of these improvements, we do not need this expertise and we can training City resources to maintain the system. No consultant is needed after completion of capital improvement projects.

**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. We are planning to ask the consultant to provide training on as- needed basis. This will include training for scheduling, cost estimating, database integration and other trainings. This should be about 10 to 20 hours per year over life of contracts. We are anticipating training of (1) 5174, (1)5211, (1) 5241, (4) 5602, (1) 5207, (1) 5203, (2) 5201, and (2) 104X IS Engineer 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 09/26/2022, 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 Ave 8th Floor San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42602 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:



Commission Approval Required  
DHR Approved for 11/21/2022

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgov.org](mailto:shale@sfgov.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42602 - 22/23  
**Date:** Monday, September 26, 2022 11:47:47 AM

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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 42602 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42602 - 22/23 for \$15,000,000 for Initial Request services for the period 02/01/2023 – 01/31/2033. 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/19224> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 42163 - 13/14)

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

Type of Service: Program Scheduling and Cost Control Staff Augmentation Services (CS-369)

Funding Source: SSIP and HSIP Programs

PSC Original Approved Amount: \$9,500,000 PSC Original Approved Duration: 10/01/14 - 09/30/18 (4 years)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 10/01/18-08/31/20 (1 year 48 weeks)

PSC Mod#2 Amount: \$4,500,000 PSC Mod#2 Duration: 09/01/20-09/30/22 (2 years 4 weeks)

PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 09/30/22-03/30/24 (1 year 26 weeks)

PSC Mod#4 Amount: no amount added PSC Mod#4 Duration: 03/30/24-06/30/24 (13 weeks 1 day)

PSC Cumulative Amount Proposed: \$14,000,000 PSC Cumulative Duration Proposed: 9 years 39 weeks

**1. Description of Work**

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

The scope of work is to augment, assist and support Program Controls Support Bureau (PCSB) staff as-needed in developing and updating detailed, resource loaded project and program schedules with work breakdown structure and major milestones; providing construction Critical Path Method (CPM) scheduling support services, including review and recommendation for time extension entitlements; forecasting and monitoring status of project schedules and budgets at completion; implementing change control management measures; establishing and maintaining the Primavera-based Program Control System for all capital improvement projects such that San Francisco Public Utilities Commission (SFPUC)/City and County of San Francisco software systems can be utilized in conjunction with PCSB Program Control System for scheduling and cost, and change control/management.

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

The development, maintenance, monitoring, controlling and reporting of project /program level schedules and budgets are the responsibility of Program Controls Group (PCG) of the Project Management Bureau (PMB). Manpower with expertise in scheduling and cost estimating is required to augment SFPUC staff. Failure to meet these objectives would impact the ability of SFPUC to successfully complete Hetchy System Improvement Program (HSIP) and the Sewer System Improvement Program (SSIP) and other critical capital improvement projects on time and within budget.

**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 42163 - 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:**

PSC 42163-13/14 authorizes SFPUC contract CS-369.A which requires a one-year amendment from its original four-year term to a five-year term from September 1, 2015 through August 31, 2020. The duration of PSC 42163-13/14 exceeds five years after Modification No. 1 because the contract start date is later than the PSC start date.

**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:  
no response from department

B. Reason for the request for modification:

The San Francisco Public Utilities Commission (SFPUC) seeks to continue the project/program controls cost and scheduling services from consultant to augment SFPUC staff in order to continue to provide on-going specialized program/project scheduling, Critical Path Method scheduling, forecasting, change control, cost control, and cost estimating for capital improvement projects in Sewer System Improvement Program, Water Enterprise Capital Improvement Program, and Hetch Hetchy Capital Improvement Program programs, and may also be called upon to provide other related services during the term of the agreement.

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

A. Specify required skills and/or expertise: 1) skill and expertise in CPM Scheduling, 2) experience in implementing Earned Value Method for progress reporting, 3) proficient in utilizing P6, 4) expertise in cost engineering and estimating, and 5) experience with change management/control.

B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5241, Engineer; 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 civil service classes listed above are applicable; however, consultants are needed to meet peak workload level. Hiring a consultant to augment City staff in the Program Controls Group (PCG) during peak will allow us to avoid layoffs after completion of the SSIP & HSIP.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be practical to adopt a new civil service class to perform this work since this expertise is only needed thru the completion of these programs.

**6. Additional Information**

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

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

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

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

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

**7. Union Notification:** On 06/08/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42163 - 13/14

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 06/17/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 42163 - 13/14)

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

Type of Service: Program Scheduling and Cost Control Staff Augmentation Services (CS-369)

Funding Source: SSIP and HSIP Programs

PSC Original Approved Amount: \$9,500,000 PSC Original Approved Duration: 10/01/14 - 09/30/18 (4 years)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 10/01/18-08/31/20 (1 year 48 weeks)

PSC Mod#2 Amount: \$4,500,000 PSC Mod#2 Duration: 09/01/20-09/30/22 (2 years 4 weeks)

PSC Cumulative Amount Proposed: \$14,000,000 PSC Cumulative Duration Proposed: 8 years 1 day

**1. Description of Work**

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

The scope of work is to augment, assist and support Program Controls Support Bureau (PCSB) staff as-needed in developing and updating detailed, resource loaded project and program schedules with work breakdown structure and major milestones; providing construction Critical Path Method (CPM) scheduling support services, including review and recommendation for time extension entitlements; forecasting and monitoring status of project schedules and budgets at completion; implementing change control management measures; establishing and maintaining the Primavera-based Program Control System for all capital improvement projects such that San Francisco Public Utilities Commission (SFPUC)/City and County of San Francisco software systems can be utilized in conjunction with PCSB Program Control System for scheduling and cost, and change control/management.

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

The development, maintenance, monitoring, controlling and reporting of project /program level schedules and budgets are the responsibility of Program Controls Group (PCG) of the Project Management Bureau (PMB). Manpower with expertise in scheduling and cost estimating is required to augment SFPUC staff. Failure to meet these objectives would impact the ability of SFPUC to successfully complete Hetchy System Improvement Program (HSIP) and the Sewer System Improvement Program (SSIP) and other critical capital improvement projects on time and within budget.

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 42163 - 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:

PSC 42163-13/14 authorizes SFPUC contract CS-369.A which requires a one-year amendment from its original four-year term to a five-year term from September 1, 2015 through August 31, 2020. The duration of PSC 42163-13/14 exceeds five years after Modification No. 1 because the contract start date is later than the PSC start date.

**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:  
no response from department

B. Reason for the request for modification:

The San Francisco Public Utilities Commission wishes to continue services to augment City staff in order to continue to provide specialized program/project scheduling, Critical Path Method scheduling, forecasting, change control, cost control, and cost estimating for capital improvement projects/programs.

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

- A. Specify required skills and/or expertise: 1) skill and expertise in CPM Scheduling, 2) experience in implementing Earned Value Method for progress reporting, 3) proficient in utilizing P6, 4) expertise in cost engineering and estimating, and 5) experience with change management/control.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5241, Engineer; 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 civil service classes listed above are applicable; however, consultants are needed to meet peak workload level. Hiring a consultant to augment City staff in the Program Controls Group (PCG) during peak will allow us to avoid layoffs after completion of the SSIP & HSIP.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be practical to adopt a new civil service class to perform this work since this expertise is only needed thru the completion of these programs.

**6. Additional Information**

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

**7. Union Notification:** On 02/12/20, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42163 - 13/14

DHR Analysis/Recommendation:

03/16/2020

Commission Approval Required

Approved by Civil Service Commission

03/16/2020 DHR Approved for 03/16/2020

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

Department: PUBLIC UTILITIES COMMISSION -- PUCDept. Code: PUCType of Request:  Initial  Modification of an existing PSC (PSC # \_\_\_\_\_)Type of Approval:  Expedited  Regular  Annual  Continuing  (Omit Posting)Type of Service: Helicopter Transportation ServicesFunding Source: Hetch Hetchy Water and Power Operating Bud PSC Duration: 5 years 1 dayPSC Amount: \$.750,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The SFPUC seeks to select Proposers with proven expertise and extensive experience in the following areas: 1. Provide aerial surveying and patrol services to support the maintenance of the power transmission system; 2. Provide priority transportation services for emergency repairs of infrastructure not accessible during certain periods of the year; 3. Provide transportation to HHWP facilities in the event of unforeseen disasters or emergencies; provide training for Human External Cargo operations, and 4. Provide as-needed shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering power to the grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods.

**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, services have been provided in the past through PSC 4045 11/12

**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.**

Current and past agreements have been for five (5) years. The five (5) year term is intended to provide budgeting and scheduling stability for Hetch Hetchy Water and Power.

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

- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

The proposed helicopter services are required on an as-needed basis for helicopter services including, but not limited to: aerial surveying; patrol services; transportation of personnel and/or materials for infrastructure repairs; priority support during unforeseen disasters or emergencies; Human External Cargo training, and, as- needed shuttle services between SFPUC facilities in the Bay Area and/or Hetch Hetchy Water and Power. The City currently does not have resources to provide these services using existing civil service classifications.

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

A. Specify required skills and/or expertise: 1. Provide passenger services on a helicopter of a make and model certified to carry the following cargo/load: a. Three (3) HHWP/SFPUC passengers; plus b. The pilot and all crew required for the passenger services; plus c. Two hundred pounds of cargo. The helicopter must have the ability to land with the load/cargo described above at 6000' elevation above sea level at a temperature of 20 degrees Celsius. 2. Provide cargo services on a helicopter of a make and model certified to lift up to 3000 lbs. at sea level. 3. Provide a copy of the Part 135 Air Carrier Certificate and the Part 133 Air Carrier Certificate. 4. Provide proof that the aircraft to be used on all HHWP flights is on the Part 135 and the Part 133 of the Air Carrier Certificate. 5. Proposer must be able to demonstrate that at least two helicopter pilot's currently on staff, to be used for all HHWP flights, have the following experience (verification required by either Pilot Log Book or Company's Records): a. A minimum of 1,500 hours total helicopter flight time as pilot in command b. A minimum of 500 hours total helicopter flight time flying at low ground levels, i.e., 500 feet AGL (above ground level) c. A minimum of 200 hours total helicopter flight time in mountainous terrain above 5000 feet density altitude (operator may be required to fly up to 10,000 feet in elevation above sea level) d. A minimum of 100 hours total helicopter flight time providing inspection of high voltage transmission lines e. Certified training in 'Human External Load' In the event additional staff is added for HHWP flights during the life of the contract, Proposer must submit applicable staff experience for review and approval by the SFPUC.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

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

Currently, there are no City resources that can provide these services.

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

A. Explain why civil service classes are not applicable.

There are no civil service classifications that provide 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. It would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is cost prohibitive.

**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. Yes. SFPUC employees will be trained in Human External Cargo and helicopter and equipment safety for a total of 20-30 hours. Approximately 10 SFPUC Electrical Lineman will receive this training.

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

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

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

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

**7. Union Notification:** On 09/26/2022, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 48374 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfwater.org](mailto:shale@sfwater.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [pking@uapd.com](mailto:pking@uapd.com); [president@sanfranciscodsa.com](mailto:president@sanfranciscodsa.com); [max.porter@seiu1021.org](mailto:max.porter@seiu1021.org); [kennethlomba@gmail.com](mailto:kennethlomba@gmail.com); [snaranjo@cirseiu.org](mailto:snaranjo@cirseiu.org); [mdennis@twusf.org](mailto:mdennis@twusf.org); [rmarenco@twusf.org](mailto:rmarenco@twusf.org); [pwilson@twusf.org](mailto:pwilson@twusf.org); [cmoyer@nccrc.org](mailto:cmoyer@nccrc.org); [noah.frigault@sfgov.org](mailto:noah.frigault@sfgov.org); [sfdpoa@icloud.com](mailto:sfdpoa@icloud.com); [Mjayne@iam1414.org](mailto:Mjayne@iam1414.org); [Emanuel, Rachel \(DEM\)](mailto:Emanuel,Rachel.(DEM)); [laborers261@gmail.com](mailto:laborers261@gmail.com); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [jennifer.esteen@seiu1021.org](mailto:jennifer.esteen@seiu1021.org); [emathurin@cirseiu.org](mailto:emathurin@cirseiu.org); [abush@cirseiu.org](mailto:abush@cirseiu.org); [sbabaria@cirseiu.org](mailto:sbabaria@cirseiu.org); [anthony@dc16.us](mailto:anthony@dc16.us); [mlobre@sfpoa.org](mailto:mlobre@sfpoa.org); [tracym@sfpoa.org](mailto:tracym@sfpoa.org); [mleach@ibt856.org](mailto:mleach@ibt856.org); [rooferslocal40@gmail.com](mailto:rooferslocal40@gmail.com); [sal@local16.org](mailto:sal@local16.org); [Criss@sfmea.com](mailto:Criss@sfmea.com); [Julie.Meyers@sfgov.org](mailto:Julie.Meyers@sfgov.org); [seichenberger@local39.org](mailto:seichenberger@local39.org); [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org); [Camaguey@sfmea.com](mailto:Camaguey@sfmea.com); [abllood@cirseiu.org](mailto:abllood@cirseiu.org); [kcartermartinez@cirseiu.org](mailto:kcartermartinez@cirseiu.org); [ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto>wendywong26@yahoo.com); [sarah.wilson@seiu1021.org](mailto:sarah.wilson@seiu1021.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [kpage@ifpte21.org](mailto:kpage@ifpte21.org); [tjenkins@uapd.com](mailto:tjenkins@uapd.com); [eerbach@ifpte21.org](mailto:eerbach@ifpte21.org); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [jb@local16.org](mailto:jb@local16.org); [Ricardo.lopez@sfgov.org](mailto:Ricardo.lopez@sfgov.org); [Basconcillo, Kathy](mailto:Basconcillo,Kathy); [Sandeep.lal@seiu1021.me](mailto:Sandeep.lal@seiu1021.me); [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net); [MRainsford@local39.org](mailto:MRainsford@local39.org); [Wendy.Frigillana@seiu1021.org](mailto:Wendy.Frigillana@seiu1021.org); [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org); [pkim@ifpte21.org](mailto:pkim@ifpte21.org); [agonzalez@iam1414.org](mailto:agonzalez@iam1414.org); [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [leah.berlanga@seiu1021.org](mailto:leah.berlanga@seiu1021.org); [gail@sfflocal798.org](mailto:gail@sfflocal798.org); [cityworker@sfcwu.org](mailto:cityworker@sfcwu.org); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); [djohnson@opcmialocal300.org](mailto:djohnson@opcmialocal300.org); [ramonliuna261@gmail.com](mailto:ramonliuna261@gmail.com); [abllood@cirseiu.org](mailto:abllood@cirseiu.org); [pkarinen@nccrc.org](mailto:pkarinen@nccrc.org); [tony@dc16.us](mailto:tony@dc16.us); [stevek@bac3-ca.org](mailto:stevek@bac3-ca.org); [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org); [Sin.Yee.Poon@sfgov.org](mailto:Sin.Yee.Poon@sfgov.org); [smcgarry@nccrc.org](mailto:smcgarry@nccrc.org); [rmitchell@twusf.org](mailto:rmitchell@twusf.org); [grojo@local39.org](mailto:grojo@local39.org); [jduritz@uapd.com](mailto:jduritz@uapd.com); [staff@sfmea.com](mailto:staff@sfmea.com); [mike@dc16.us](mailto:mike@dc16.us); [khughes@ibew6.org](mailto:khughes@ibew6.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [sfmsa@gmail.com](mailto:sfmsa@gmail.com); [bart@dc16.us](mailto:bart@dc16.us); [david.canham@seiu1021.org](mailto:david.canham@seiu1021.org); [jtanner940@aol.com](mailto:jtanner940@aol.com); [oashworth@ibew6.org](mailto:oashworth@ibew6.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [laborers261@gmail.com](mailto:laborers261@gmail.com); [local200twu@sbcglobal.net](mailto:local200twu@sbcglobal.net); [speedy4864@aol.com](mailto:speedy4864@aol.com); [Christina@sfmea.com](mailto:Christina@sfmea.com); [ecdemvoter@aol.com](mailto:ecdemvoter@aol.com); [thomas.vitale@seiu1021.org](mailto:thomas.vitale@seiu1021.org); [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 48374 - 22/23  
**Date:** Monday, September 26, 2022 11:07:42 AM

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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 48374 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 48374 - 22/23 for \$750,000 for Initial Request services for the period 10/01/2023 – 09/30/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19223> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

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

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

# **Additional Attachment(s)**



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4045 11/12)

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

Type of Service: Helicopter Transport and Aerial Surveying Services (CS-217/CS-329/PRO.0078)

Funding Source: Hetch Hetchy Operating Funds

PSC Original Approved Amount: \$96,500 PSC Original Approved Duration: 11/07/11 - 08/31/16 (4 years 42 weeks)

PSC Mod#1 Amount: \$500,000 PSC Mod#1 Duration: 09/01/16-11/30/16 (13 weeks 1 hour)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 12/01/16-11/30/21 (5 years 1 day)

PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 12/01/21-09/30/23 (1 year 43 weeks)

PSC Mod#4 Amount: \$250,000 PSC Mod#4 Duration: no duration added

PSC Cumulative Amount Proposed: \$846,500 PSC Cumulative Duration Proposed: 11 years 47 weeks

**1. Description of Work**

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

The contractor will provide helicopters and certified pilots to provide as needed services including: Aerial surveying and patrol services to support the maintenance of the power transmission system; transportation services for emergency repairs of infrastructure to areas not accessible all year; transportation to San Francisco Public Utilities Commission(SFPUC) and Hetch Hetchy Water and Power facilities in the event of unforeseen disasters or emergencies; and, priority shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering Power to the Grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods. This request is for additional capacity which will allow the SFPUC to solicit and award a contract to a firm who can offer backup 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.**

Services have been provided in the past through earlier PSC request. See 4045 11/12

**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:**

is The duration for this five year extension is being requested in order to provide continued use of helicopter services for aerial inspection of transmission towers and transmission lines, and other projects as needed.

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

**A. Display all that apply**

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

Explain the qualifying circumstances:

The City needs a helicopter and licensed pilots. Current Civil service classes do not provide these services. And it would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

B. Reason for the request for modification:

This contract is needed to provide both routine and emergency helicopter services for Hetch Hetchy Water and Power. There are two helicopter service providers in our rural area – A&P Helicopters, and Intermountain Helicopters. Intermountain Helicopter has indicated they have long-term contracts with the USDA Forest Service for fire-fighting, and cannot provide service during the summer months. For this reason, we are requesting an amendment to the PSC for A&P Helicopters to allow service throughout the calendar year, including the summer months, when we also experience high fire danger.”

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

- A. Specify required skills and/or expertise: The service requires trained and qualified helicopter pilot licensed by the Federal Aviation Administration to conduct Part 135 flight operations at low altitude in elevations up to 6,000 feet above sea level. Pilot(s) are required to carry “Long Line” and “External Human Load (EHL)” certifications.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

**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.  
There is no civil service class that provides 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: It would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

**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. SFPUC employees will be certified in Helicopter and equipment safety training. 20-30 hours total. A total of approximately 10 employees will receive this training.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

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

7. **Union Notification:** On 09/20/21, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4045 11/12

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 10/12/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:     Initial                     Modification of an existing PSC (PSC # 4045 11/12)

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

Type of Service: Helicopter Transport and Aerial Surveying Services (CS-217/CS-329/PRO.0078)

Funding Source: Hetch Hetchy Operating Funds

PSC Original Approved Amount: \$96,500

PSC Original Approved Duration: 11/07/11 - 08/31/16 (4 years 42 weeks)

PSC Mod#1 Amount: \$500,000

PSC Mod#1 Duration: 09/01/16-11/30/16 (13 weeks 1 hour)

PSC Mod#2 Amount: no amount added

PSC Mod#2 Duration: 12/01/16-11/30/21 (5 years 1 day)

PSC Mod#3 Amount: no amount added

PSC Mod#3 Duration: 12/01/21-09/30/23 (1 year 43 weeks)

PSC Cumulative Amount Proposed: \$596,500

PSC Cumulative Duration Proposed: 11 years 47 weeks

**1. Description of Work**

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

The contractor will provide helicopters and certified pilots to provide as needed services including: Aerial surveying and patrol services to support the maintenance of the power transmission system; transportation services for emergency repairs of infrastructure to areas not accessible all year; transportation to San Francisco Public Utilities Commission(SFPUC) and Hetch Hetchy Water and Power facilities in the event of unforeseen disasters or emergencies; and, priority shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering Power to the Grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods. This request is for additional capacity which will allow the SFPUC to solicit and award a contract to a firm who can offer backup 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.**

Services have been provided in the past through earlier PSC request. See 4045 11/12

**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:**

is The duration for this five year extension is being requested in order to provide continued use of helicopter services for aerial inspection of transmission towers and transmission lines, and other projects as needed.

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

**A. Display all that apply**

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

**Explain the qualifying circumstances:**

The City needs a helicopter and licensed pilots. Current Civil service classes do not provide these services. And it would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

**B. Reason for the request for modification:**

To provide continued use of helicopter services for aerial inspection of transmission towers and lines; transport for emergency response and equipment to inaccessible areas; 'short haul' transport of personnel for training and; other as-needed flights.

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

- A. Specify required skills and/or expertise: The service requires trained and qualified helicopter pilot licensed by the Federal Aviation Administration to conduct Part 135 flight operations at low altitude in elevations up to 6,000 feet above sea level. Pilot(s) are required to carry "Long Line" and "External Human Load (EHL)" certifications.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

**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.  
There is no civil service class that provides 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: It would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

**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. SFPUC employees will be certified in Helicopter and equipment safety training. 20-30 hours total. A total of approximately 10 employees will receive this training.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification: On 04/07/20, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified**

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

Name: 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# 4045 11/12

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 04/27/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4045 11/12)

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

Type of Service: Helicopter Transport and Aerial Surveying Services (CS-217/CS-329/PRO.0078)

Funding Source: Hetch Hetchy Operating Funds

PSC Original Approved Amount: \$96,500 PSC Original Approved Duration: 11/07/11 - 08/31/16 (4 years 42 weeks)

PSC Mod#1 Amount: \$500,000 PSC Mod#1 Duration: 09/01/16-11/30/16 (13 weeks 1 hour)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 12/01/16-11/30/21 (5 years 1 day)

PSC Cumulative Amount Proposed: \$596,500 PSC Cumulative Duration Proposed: 10 years 3 weeks

**1. Description of Work**

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

The contractor will provide helicopters and certified pilots to provide as needed services including: Aerial surveying and patrol services to support the maintenance of the power transmission system; transportation services for emergency repairs of infrastructure to areas not accessible all year; transportation to San Francisco Public Utilities Commission(SFPUC) and Hetch Hetchy Water and Power facilities in the event of unforeseen disasters or emergencies; and, priority shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering Power to the Grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods. This request is for additional capacity which will allow the SFPUC to solicit and award a contract to a firm who can offer backup 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.**

Services have been provided in the past through earlier PSC request. See 4045 11/12

**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:**

is The duration for this five year extension is being requested in order to provide continued use of helicopter services for aerial inspection of transmission towers and transmission lines, and other projects as needed.

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

**A. Display all that apply**

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

**Explain the qualifying circumstances:**

The City needs a helicopter and licensed pilots. Current Civil service classes do not provide these services. And it would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

- B. Reason for the request for modification:  
To align PSC duration with contract duration.

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

- A. Specify required skills and/or expertise: The service requires trained and qualified helicopter pilot licensed by the Federal Aviation Administration to conduct Part 135 flight operations at low altitude in elevations up to 6,000 feet above sea level. Pilot(s) are required to carry "Long Line" and "External Human Load (EHL)" certifications.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

**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.  
There is no civil service class that provides 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: It would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is extremely cost prohibitive.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
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- 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 09/12/16, 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: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfgwater.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4045 11/12

DHR Analysis/Recommendation:

10/17/2016

Commission Approval Required

Approved by Civil Service Commission

10/17/2016 DHR Approved for 10/17/2016



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF -- SHE

Dept. Code: SHE

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

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

Type of Service: Refuse services for San Francisco County Jail #3 located in San Bruno, CA

Funding Source: General Fund

PSC Duration: 52 weeks

PSC Amount: \$120,000

**1. Description of Work**

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

The San Francisco Sheriff's Office propose to enter into a contract with Recology San Bruno for the garbage collection services for San Francisco County Jail #3 located in San Bruno, CA. Under the San Bruno Municipal Code 10.20.050, the City of San Bruno issued an exclusive contract for the collection of garbage with Recology San Bruno.

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

The San Bruno Municipal Code 10.20.050 issued an exclusive permanent contract of garbage services within the City of San Bruno to Recology San Bruno. Recology San Bruno provides garbage services for approximately 700 Civil Service staff and incarcerated persons. At full capacity, County Jail #3 will house 832 incarcerated persons. County Jail #3 generates a large volume of garbage on a daily basis. Denial of services will lead to a violation of the San Bruno Municipal Code and will disrupt the garbage service at County Jail #3. Any disruption of the garbage service will quickly lead to health and safety risks from exposure of uncollected refuse.

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

The Office of Contract Administration has approved Sole Source Waivers for Recology San Bruno per the San Bruno Municipal Code 10.20.050 granting Recology San Bruno an exclusive contract for the collection of garbage within the city of San Bruno.

D. Will the contract(s) be renewed?

The contract will be reviewed and renewed annually to meet the mandate of San Bruno Municipal Code 10.20.050.

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 Sheriff's Office do not have the specialized equipment, expertise and resources to provide the garbage collection services to meet the needs of the department. In addition, the San Bruno Municipal Code 10.20.050 grants an exclusive contract for the collection of garbage within the city of San Bruno.

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

A. Specify required skills and/or expertise: Garbage service at County Jail #3 requires specialized equipment and knowledge of sanitation codes and operation of collection equipment.

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: Garbage service at County Jail #3 requires specialized equipment to collect the refuse in compactors. Recology San Bruno will provide the specialized vehicles and equipment to perform the garbage services required at County Jail #3.

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

The Sheriff's Office do not have the specialized equipment, expertise and resources to provide the garbage collection services to meet the needs of the department. San Bruno Municipal Code 10.20.050 grants an exclusive contract for the collection of garbage within the city of San Bruno.

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

A. Explain why civil service classes are not applicable.

Civil Service classes are not applicable. The San Bruno Municipal Code 10.20.050 has an exclusive permanent contract of garbage services within the City of San Bruno to Recology San Bruno.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class to perform this work. The San Bruno Municipal Code 10.20.050 has an exclusive permanent contract of garbage services within the City of San Bruno to Recology San Bruno.

**6. Additional Information**

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

No.

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

No. Training is not applicable. San Bruno Municipal Code 10.20.050 grants an exclusive contract for the collection of garbage within the city of San Bruno.

- 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. The Office of Contract Administration has approved Sole Source Waivers for Recology San Bruno. General Services outside City and County of San Francisco does not require CSC approval. The San Bruno Municipal Code 10.20.050 granting Recology San Bruno an exclusive contract for the collection of garbage within the city of San Bruno.

**7. Union Notification:** On 09/19/2022, 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: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 456 San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41517 - 22/23

DHR Analysis/Recommendation:  
Commission Approval Required  
DHR Approved for 11/21/2022

Civil Service Commission Action:

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

## Gong, Henry (SHF)

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**From:** dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org  
**Sent:** Monday, September 19, 2022 11:31 AM  
**To:** Gong, Henry (SHF); Pierre King - UAPD; president@sanfranciscodsa.com; max.porter@seiu1021.org; 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 (DBI); 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; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; Stan Eichenberger; Jason Klumb; 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; 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; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; Gong, Henry (SHF); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 41517 - 22/23

RECEIPT for Union Notification for PSC 41517 - 22/23 more than \$100k

The SHERIFF -- SHF has submitted a request for a Personal Services Contract (PSC) 41517 - 22/23 for \$120,000 for Initial Request services for the period 10/01/2022 – 09/30/2023. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19179> 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)**

**Estimated Recology Cost for FY22-23**

**Commercial Garbage**

	<u>Service</u>	<u>Bin Rental</u>
(1) - 1 yard garbage bins - serviced 1/ week	\$ 398.90	\$ 54.60

	<u>Monthly Cost</u>	<u>Annual Cost</u>
Service (1 bin)	\$ 398.90	\$ 4,786.80
Bin Rental (1 bin)	\$ 54.60	\$ 655.20
	<b>\$ 453.50</b>	<b>\$ 5,442.00</b>

**Organic Services**

	<u>Service</u>	<u>Bin Rental</u>
(1) - 1 yard organics bin - serviced 1/ week	\$ 149.63	\$ 35.27

	<u>Monthly Cost</u>	<u>Annual Cost</u>
Service (1 bin)	\$ 149.63	\$ 1,795.56
Bin Rental (1 bin)	\$ 35.27	\$ 423.24
	<b>\$ 184.90</b>	<b>\$ 2,218.80</b>

**Garbage Services - Training Center**

	<u>Service</u>	<u>Bin Rental</u>
(2) - 96 gallon garbage toters - serviced 1/ week	\$ 310.00	\$ -
(1) - 96 gallon organics toter - serviced 1/ week	\$ 107.00	\$ -

	<u>Monthly Cost</u>	<u>Annual Cost</u>
Service (2 bin)	\$ 620.00	\$ 7,440.00
Bin Rental (1 bin)	\$ 107.00	\$ 1,284.00
	<b>\$ 727.00</b>	<b>\$ 8,724.00</b>

	<u>Monthly Cost</u>	<u>Annual Cost</u>
<b>Aggregate Garbage &amp; Organic Service</b>	<b>\$ 1,365.40</b>	<b>\$ 16,384.80</b>

**Debris Box Service**

- (1) - 25 yard compactor, serviced 1x/week - \$1,603.90/ exchange
- (1) - 16 yard open debris box, cardboard, no charge
- (1) - 30 yard open debris box, on call service, \$914.39/ exchange

	<u>Exchg Cost</u>	<u># of Exchg</u>	<u>Annual Cost</u>
25 yard compactor	\$ 1,844.49	52	\$ 95,913.48
16 yard open debris box (No Charge)	\$ -	52	\$ -
30 yard open debris box, on call service	\$ 1,051.55	7	\$ 7,360.85
	<b>\$ 2,896.04</b>	<b>111</b>	<b>\$ 103,274.33</b>

**Projected Costs**

**\$ 119,659.13**

**ORDINANCE OF THE CITY OF SAN BRUNO  
ESTABLISHING GARBAGE AND REFUSE RATES**

**Whereas,** pursuant to Article XI, Section 7 of the California Constitution and Section 10.20.050 of the San Bruno Municipal Code, the City has granted Recology San Bruno ("Recology") an exclusive contract for the collection of garbage and rubbish within the city; and

**Whereas,** the City regulates the rates charged by Recology to San Bruno residents and businesses; and

**Whereas,** pursuant to Section 10.20.050(D) of the Municipal Code, the City has agreed to assist Recology with the billing and collection of such rates; and

**Whereas,** Recology has requested approval of a rate increase of 5.34% effective July 1, 2019; and

**Whereas,** notice of a public hearing on that proposed rate increase was mailed to garbage and refuse customers 45 days prior to May 14, 2019; and

**Whereas,** the City retained R3 Consulting Group, an independent consulting firm specializing in utility rate reviews exclusively for public agencies, to conduct a thorough review of Recology's FY2019-20 rate application. R3 recommended a rate increase of 4.43% after adjustments to Recology's projections for July 1, 2019; and

**Whereas,** on May 14, 2019, at 7:00 p.m. at the San Bruno Senior Center located at 1555 Crystal Springs Road, San Bruno, California, the City Council held a public hearing on the proposed rate increase; and

**Whereas,** at the public hearing, the City Council considered testimony and protests from all interested persons; and

**Whereas,** the City Council did not receive written protests against the rate increase from a majority of the customers or parcels served by Recology; and

**Whereas,** the City Council now desires to approve the proposed rate increase.

The City Council of the City of San Bruno does ordain as follows:

Section 1. The above-stated recitals are true and correct.

Section 2. By its Ordinance No. 1824, this Council previously approved comprehensive garbage and refuse rates. Ordinance No. 1824 is hereby rescinded and superseded.

Section 3. The following rates for the collection of garbage and refuse are hereby approved:



**RECYCLING FACILITIES  
in San Mateo County**

	Mixed C&D	Mixed Inerts	Asphalt	Bricks	Carpet	Cardboard	Concrete	Dirt	Drywall	Metal	Pallets	Porcelain	Rock	Roofing	Wood untreated	Yard Trimmings
<b>Recology San Bruno</b> 101 Tanforan Ave., San Bruno 650-583-8536	■		■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>Blue Line Transfer Inc.</b> 500 East Jamie Court, SSF 650-589-5511	■		■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>BFI San Carlos Transfer Station</b> 225 Shoreway Rd., San Cailos 650-592-2411	■		■	■	■	■	■	■		■				■	■	■
<b>Brisbane Recycling Co.</b> 5 Beatty Rd., Brisbane 415-468-8822			■				■									
<b>Recology of the Coast</b> 1046 Palmetto Ave., Pacifica 650-355-8400	■			■		■	■		■	■	■	■			■	■
<b>Granite Rock</b> 195 Seaport Blvd., Redwood City 650-482-3840			■				■									
<b>Harbor Sand and Gravel Inc.</b> 775 Seaport Blvd., Redwood City 650-357-7124		■	■				■	■					■			
<b>Ox Mountain Sanitary Landfill</b> 12310 San Mateo Rd., Half Moon Bay 650-726-1819								■								
<b>Pescadero Transfer Station</b> Bean Hollow Rd., Pescadero 650-879-0729						■				■					■	■
<b>Ryan Engineering</b> 5 Beatty Rd., Brisbane 650-877-8088								■								
<b>SRDC</b> 199 Seaport, Redwood City 650-367-7324		■	■	■			■	■				■	■			

# Construction Recycling



## Residential Requirements



**City of San Bruno**

**Community Development  
Department**

**Building Division**

567 El Camino Real  
San Bruno, CA 94066  
Phone (650) 616-7074

[www.sanbruno.ca.gov](http://www.sanbruno.ca.gov)

REVISED June 2014

## Do you want to get your Construction and Demolition deposit back?

Then you MUST recycle at least 50 percent of the construction and demolition debris ~ San Bruno Municipal Code 10.23.030

### Requirements:

1. Fill out a “Recycling and Waste Reduction” form (Attachment A) before the permit is issued on any complete demolition, complete new building, or alteration of \$50,000 or more (SBMC10.23.040).
2. Completely fill out Monthly Reports and submit with all weight tags and receipts from Recology San Bruno or a permitted facility indicating the amounts recycled and disposed (SBMC 10.23.070). **Weight tags and receipts must indicate the material type and are required to verify that the City of Origin is San Bruno.**

3. Submit the reports for the demolition recycling within 60 days of demolition completion (SBMC 10.23.080A).
4. You MUST submit the reports for CONSTRUCTION recycling BEFORE the final inspection (SBMC 10.23.080B).
5. Construction and Demolition deposits will be Forfeited if reports are not submitted on time (SBMC 10.23.080E).

Debris boxes are available in a variety of sizes and most boxes are placed on the street. For rates, information or to place an order for a debris box, please call Recology San Bruno.

**Recology San Bruno**  
**Debris Boxes - Customer Service**  
**8:00 a.m. – 5:00 p.m. - 650-583-8536**  
[www.recologysanbruno.com](http://www.recologysanbruno.com)

**NOTE:** *Recology San Bruno is the Exclusive Franchise Hauler for the City of San Bruno. (SBMC 10.20.050). Debris Boxes must be contracted through San Bruno Garbage Company unless materials are being removed by licensed construction or demolition contractor as part of a total service, when the removal is performed by an employee of the contractor using equipment owned by contractor or the City.*

## Chapter 10.23 Recycling and Diversion of Construction and Demolition Debris

Section 10.23.050 Deposit required  
As a condition precedent to issuance of any building or demolition permit for a covered project, the applicant shall post a cash deposit in the amount of fifty dollars for each estimated ton of generated construction and demolition debris, based on calculations approved by the city. The minimum deposit for all covered projects shall not be less than one thousand dollars. The deposit shall be returned, without interest, within a reasonable amount of time following proof to the satisfaction of the building official that no less than the required percentages of debris generated by the project have been diverted from landfill in accordance with the provisions of this chapter. If a lesser percentage of debris is diverted than is required, a proportionate share of the deposit will be returned. The deposit shall be forfeited to the extent that there is a failure to comply with the requirements of this chapter.

**When ordering debris boxes or self-hauling materials, advise Recology San Bruno and/or permitted facility that your project is under a Construction & Demolition (C&D) Recycling Ordinance.**

## Gong, Henry (SHF)

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**From:** CCSF IT Service Desk <ccsfdt@service-now.com>  
**Sent:** Thursday, September 01, 2022 5:02 PM  
**To:** Gong, Henry (SHF)  
**Subject:** OCAWVR0006506 – 'Waive Competitive Solicitation Requirements' has been Approved

Dear Henry Gong,

This is to inform you that OCAWVR0006506 - 'Request to Waive Competitive Solicitation Requirements' has been approved.

Please include a copy of this email in your purchase /contract request to OCA.

**Summary of Request:** Sole Source Waiver request for Recology Peninsula Services.

**Admin Code for Determination:**

Reg 21.5(b): No Substitute / Only One Source (No Bid Required)

**Requisition ID:** 0000240772

**Reason for determination:** Pursuant to Article XI, Section 7 of the Clifornia Constitution and Section 10.20.050 of the San Bruno Municipal Code, San Bruno has granted Recology San Bruno an exclusive contract for the collection of garbage and rubbish within the City of San Bruno.

**Total approved amount:** \$120,000.00

[Take me to the OCA Waiver Request](#)

Thank you.

Ref:TIS3673379\_HEXFy5ipXmHAFbDcgjX

# **Modification**

## **Personal Services Contracts**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION

Dept. Code: AIR

Type of Request:  Initial  Modification of an existing PSC (PSC # 40888 - 16/17)

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

Type of Service: Project Mgmt Support Svcs & Design Build Svcs for the Energy Mgmt Control System Program

Funding Source: Airport Capital Funds

PSC Original Approved Amount: \$100,000,000 PSC Original Approved Duration: 07/21/17 - 06/30/21 (3 years 49 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 06/30/21-06/01/23 (1 year 48 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/01/23-12/31/25 (2 years 30 weeks)

PSC Cumulative Amount Proposed: \$100,000,000 PSC Cumulative Duration Proposed: 8 years 23 weeks

**1. Description of Work**

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

Project Management Support Services (PMSS) & Design Build (DB) teams will manage and complete the design and construction of the Energy Management Control System (EMCS) program at the San Francisco International Airport (Airport). The EMCS is a system comprised of hardware and software that manages and controls a building's use of energy for heating, ventilation, air conditioning, water, gas, and electricity. The EMCS will replace the multiple systems currently used by stationary engineers with 1 centralized system. The EMCS will comply with American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) 36 guidelines, the most recent industry-standard nationally-recognized uniform standards for heating, ventilating, and air-conditioning systems, (<http://gpc36.savemyenergy.com/download/360/>) to connect all buildings, provide campus-level management and control, and transfer data to Information Technology and Telecommunications (ITT). This project includes creating the building management system for both terminal and non-terminal buildings from multiple segmented systems to 1 connected system to track energy and utilities information. Services include project controls, scheduling, document controls, design management, contracts management, architectural and engineering design services, construction, and special systems integration services. All work will be supervised by the project manager. A staffing plan will be developed and Stationary Engineers will maintain the EMCS equipment and system. Of the amount requested, construction costs will account for an estimated \$80,000,000.

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

Services are necessary to replace the existing segmented building management systems that are unable to communicate with one another. Some systems are beyond their useful lives, which increases their risk of failure, affecting the reliability of mechanical and electrical equipment. The EMCS project will enable Facilities and Operations to more easily manage the Airport's energy usage, increase energy efficiency, and decrease operational costs. If denied, the project will be delayed, resulting in continually increased operations and maintenance costs and decreased ability to meet the Airport's strategic initiative for Net Zero Energy by 2021.

**C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.**  
PSC 40888-16/17

**D. Will the contract(s) be renewed?**  
Yes, if there continues to be a need at the Airport.

**E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:**  
The project was suspended because of Covid. Now the project has been re-started so we need to extend to cover the project duration and closeout.

**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:

Services are directly related to the EMCS program, a short-term capital project that requires specialized skills and expertise in airport facility development, building automation system design, energy management system design, and compliance with ASHRAE 36 guidelines.

B. Reason for the request for modification:

The project was suspended because of Covid. Now the project has been re-started so we need to extend to cover the project duration and closeout.

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

- A. Specify required skills and/or expertise: Specialized skills and expertise in airport facility development, building automation system design, energy management system design, design management, integration of airline and tenant business requirements, and project and construction management are required. Expertise in Building Automation and Control network (BACnet) programming, an industry-standard language designed to allow building systems to communicate, per ASHRAE 36 guidelines is required so that the EMCS is compatible with ITT standards.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5261, Architectural Assistant 2; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2; 5502, Project Manager 1; 5504, Project Manager 2; 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?**

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Existing classes do not have the required specialized skills necessary for the design and construction of a large-scale Airport facility project, specifically in regard to the design and development of the proposed building management system, the integration of multiple legacy systems into the proposed system, and the commission of systems once they have been integrated into the new system. Existing classes also do not have the required expertise in BACnet programming per ASHRAE 36 guidelines.
- 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, an Airport facility project of this scope and scale does not occur frequently enough to justify permanent staffing. Once the project is completed, specialized services will not be required.

**6. Additional Information**

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

Faith Group LLC and Suffolk Construction

7. **Union Notification:** On 10/21/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40888 - 16/17

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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



## Cynthia Avakian (AIR)

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**From:** dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com  
**Sent:** Friday, October 21, 2022 9:33 AM  
**To:** Cynthia Avakian (AIR); Laxamana, Junko (DBI); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; l21pscreview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Modification Request to PSC # 40888 - 16/17 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The AIRPORT COMMISSION -- AIR has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period June 1, 2023

– December 31, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F15519&data=05%7C01%7C%2Fcynthia.avakian%40flysfo.com%7C82d5e9bb16f045ce656508dab381f8f5%7C22d5c2cfce3e443d9a7fdfcc0231f73f%7C0%7C0%7C638019668051104660%7CUnknown%7CTWFpbGZsb3d8eyJWljoImCIDAwLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6IklhaWwiLCJXVCi6Mn0%3D%7C3000%7C%7C%7C&sd=75Nw%2F1fNPIP72Z6H3g7Y3%2Byv846yHDDpRBvmaHCTFQs%3D&amp;reserved=0>

Email sent to the following addresses: L21PSCReview@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com junko.laxamana@sfgov.org

# **Additional Attachment(s)**

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

Department: AIRPORT COMMISSIONDept. Code: AIRType of Request:  Initial  Modification of an existing PSC (PSC # 40888 - 16/17)Type of Approval:  Expedited  Regular  Annual  Continuing  (Omit Posting)Type of Service: Project Mgmt Support Svcs & Design Build Svcs for the Energy Mgmt Control System ProgramFunding Source: Airport Capital FundsPSC Original Approved Amount: \$100,000,000PSC Original Approved Duration: 07/21/17 - 06/30/21 (3 years 49 weeks)PSC Mod#1 Amount: no amount addedPSC Mod#1 Duration: 06/30/21-06/01/23 (1 year 48 weeks)PSC Cumulative Amount Proposed: \$100,000,000PSC Cumulative Duration Proposed: 5 years 45 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Project Management Support Services (PMSS) & Design Build (DB) teams will manage and complete the design and construction of the Energy Management Control System (EMCS) program at the San Francisco International Airport (Airport). The EMCS is a system comprised of hardware and software that manages and controls a building's use of energy for heating, ventilation, air conditioning, water, gas, and electricity. The EMCS will replace the multiple systems currently used by stationary engineers with 1 centralized system. The EMCS will comply with American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) 36 guidelines, the most recent industry-standard nationally-recognized uniform standards for heating, ventilating, and air-conditioning systems, (<http://gpc36.savemyenergy.com/download/360/>) to connect all buildings, provide campus-level management and control, and transfer data to Information Technology and Telecommunications (ITT). This project includes creating the building management system for both terminal and non-terminal buildings from multiple segmented systems to 1 connected system to track energy and utilities information. Services include project controls, scheduling, document controls, design management, contracts management, architectural and engineering design services, construction, and special systems integration services. All work will be supervised by the project manager. A staffing plan will be developed and Stationary Engineers will maintain the EMCS equipment and system. Of the amount requested, construction costs will account for an estimated \$80,000,000.

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

Services are necessary to replace the existing segmented building management systems that are unable to communicate with one another. Some systems are beyond their useful lives, which increases their risk of failure, affecting the reliability of mechanical and electrical equipment. The EMCS project will enable Facilities and Operations to more easily manage the Airport's energy usage, increase energy efficiency, and decrease operational costs. If denied, the project will be delayed, resulting in continually increased operations and maintenance costs and decreased ability to meet the Airport's strategic initiative for Net Zero Energy by 2021.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.  
PSC 40888-16/17
- D. Will the contract(s) be renewed?  
Yes, if there continues to be a need at the Airport.
- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:  
Need to extend time to align with contract.

**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:

Services are directly related to the EMCS program, a short-term capital project that requires specialized skills and expertise in airport facility development, building automation system design, energy management system design, and compliance with ASHRAE 36 guidelines.

B. Reason for the request for modification:  
Need to extend time to align with contract.

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

- A. Specify required skills and/or expertise: Specialized skills and expertise in airport facility development, building automation system design, energy management system design, design management, integration of airline and tenant business requirements, and project and construction management are required. Expertise in Building Automation and Control network (BACnet) programming, an industry-standard language designed to allow building systems to communicate, per ASHRAE 36 guidelines is required so that the EMCS is compatible with ITT standards.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5261, Architectural Assistant 2; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2; 5502, Project Manager 1; 5504, Project Manager 2; 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?**

Not Applicable

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

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

Existing classes do not have the required specialized skills necessary for the design and construction of a large-scale Airport facility project, specifically in regard to the design and development of the proposed building management system, the integration of multiple legacy systems into the proposed system, and the commission of systems once they have been integrated into the new system. Existing classes also do not have the required expertise in BACnet programming per ASHRAE 36 guidelines.

- 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, an Airport facility project of this scope and scale does not occur frequently enough to justify permanent staffing. Once the project is completed, specialized services will not be required.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
See attached Training Information.
- 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.  
Faith Group LLC and Suffolk Construction

**7. Union Notification:** On 09/15/20, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40888 - 16/17

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 09/22/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Project Mgmt Support Svcs & Design Build Svcs for the Energy Mgmt Control System Program

Funding Source: Airport Capital Funds

PSC Amount: \$100,000,000

PSC Est. Start Date: 07/21/2017

PSC Est. End Date  
06/30/2021

**1. Description of Work**

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

Project Management Support Services (PMSS) & Design Build (DB) teams will manage and complete the design and construction of the Energy Management Control System (EMCS) program at the San Francisco International Airport (Airport). The EMCS is a system comprised of hardware and software that manages and controls a building's use of energy for heating, ventilation, air conditioning, water, gas, and electricity. The EMCS will replace the multiple systems currently used by stationary engineers with 1 centralized system. The EMCS will comply with American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) 36 guidelines, the most recent industry-standard nationally-recognized uniform standards for heating, ventilating, and air-conditioning systems, (<http://gpc36.savemyenergy.com/download/360/>) to connect all buildings, provide campus-level management and control, and transfer data to Information Technology and Telecommunications (ITT). This project includes creating the building management system for both terminal and non-terminal buildings from multiple segmented systems to 1 connected system to track energy and utilities information. Services include project controls, scheduling, document controls, design management, contracts management, architectural and engineering design services, construction, and special systems integration services. All work will be supervised by the project manager. A staffing plan will be developed and Stationary Engineers will maintain the EMCS equipment and system. Of the amount requested, construction costs will account for an estimated \$80,000,000.

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

Services are necessary to replace the existing segmented building management systems that are unable to communicate with one another. Some systems are beyond their useful lives, which increases their risk of failure, affecting the reliability of mechanical and electrical equipment. The EMCS project will enable Facilities and Operations to more easily manage the Airport's energy usage, increase energy efficiency, and decrease operational costs. If denied, the project will be delayed, resulting in continually increased operations and maintenance costs and decreased ability to meet the Airport's strategic initiative for Net Zero Energy by 2021.

**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 service.

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

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

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

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

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

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

- B. Explain the qualifying circumstances:

Services are directly related to the EMCS program, a short-term capital project that requires specialized skills and expertise in airport facility development, building automation system design, energy management system design, and compliance with ASHRAE 36 guidelines.

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

- A. Specify required skills and/or expertise: Specialized skills and expertise in airport facility development, building automation system design, energy management system design, design management, integration of airline and tenant business requirements, and project and construction management are required. Expertise in Building Automation and Control network (BACnet) programming, an industry-standard language designed to allow building systems to communicate, per ASHRAE 36 guidelines is required so that the EMCS is compatible with ITT standards.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5174, Administrative Engineer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5261, Architectural Assistant 2; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2; 5502, Project Manager 1; 5504, Project Manager 2; 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?**

On February 8, 2017, a Notice of Intent (NOI) for PMSS and DB services was issued to the following departments: Public Utilities Commission, Department of Public Works, Port of San Francisco, and the San Francisco Municipal Transportation Agency. No responses with interest in participating were received by the deadline of February 22, 2017.

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

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

Existing classes do not have the required specialized skills necessary for the design and construction of a large-scale Airport facility project, specifically in regard to the design and development of the proposed building management system, the integration of multiple legacy systems into the proposed system, and the commission of systems once they have been integrated into the new system. Existing classes also do not have the required expertise in BACnet programming per ASHRAE 36 guidelines.



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, an Airport facility project of this scope and scale does not occur frequently enough to justify permanent staffing. Once the project is completed, specialized services will not be required.

**6. Additional Information**

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

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

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

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

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

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

**7. Union Notification:** On 05/22/2017, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40888 - 16/17

DHR Analysis/Recommendation:

action date: 08/07/2017

Commission Approval Required

Approved by Civil Service Commission

08/07/2017 DHR Approved for 08/07/2017

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 # 31087 - 21/22)

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

Type of Service: Consulting - Economic Impact Analysis

Funding Source: Local general funds

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 05/01/22 - 04/30/23 (52 weeks)

PSC Mod#1 Amount: \$250,000 PSC Mod#1 Duration: 07/01/23-06/30/24 (1 year 8 weeks)

PSC Cumulative Amount Proposed: \$350,000 PSC Cumulative Duration Proposed: 2 years 8 weeks

**1. Description of Work**

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

OEWD seeks a qualified consultant (or team of consultants) to support an economic impact analysis, to inform the City's economic recovery efforts with respect to the COVID-19 pandemic. The goals of the analysis include:

- To determine changes to the economic make up of San Francisco's office core as a result of COVID-19 and how changes to employee commuting patterns will impact the viability and the space requirements of downtown offices and office-serving small businesses
- To assess San Francisco office core's competitiveness relative to other comparable markets within the State and nationally
- To identify the policies, programs, resources, and interventions required to maximize new entrants to the San Francisco office market as well as the adaptation and long-term robustness of San Francisco offices operating in the post-COVID economic context, and
- To identify the activities, uses, and incentives that will increase the motivation for employees and other stakeholders to choose to work and/or visit the downtown office core

The scope of this contract (or contracts) will include research tasks (surveys, interviews, stakeholder engagement) as well as impact analysis tasks, described below.

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

This service is necessary to ensure that the City's investments in economic recovery activities are coordinated and directly responsive to the needs of the City's workers and businesses. This contract (or contracts) will enable OEWD to gain insights into the future needs of businesses as a result of the COVID-19 pandemic as well as types of uses and amenities that will be compelling to draw a remote workforce into the office going forward.

- 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 modification would continue existing services.

D. Will the contract(s) be renewed?

Unknown at this time.

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

Not applicable

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

A. Display all that apply

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

Explain the qualifying circumstances:

The skill sets needed for this scope of services are highly specialized, and the project is short-term.

B. Reason for the request for modification:

Request to add \$250,000 and add one year in order to provide additional economic recovery support

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

A. Specify required skills and/or expertise: For Primary Research into the State of San Francisco Business and COVID Economic Impact scope (Research): Applicants must have at least 5 years of experience in performing survey work at a City scale Expertise and demonstrable success in comparable projects that include robust surveying efforts of San Francisco-based businesses For State of San Francisco Business and COVID Economic Impact Analysis scope (Impact Analysis): Applicants must have at least 5 years of experience in performing economic analysis for local government entities of a similar size/scale as San Francisco Expertise and demonstrable success in comparable projects that include analyzing a combination of primary and secondary economic data to assess and make recommendations about responding strategically to a rapidly changing economic context

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, this is not needed.

**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 service is short-term and highly specialized.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Not at this time; this project is anticipated to be short-term.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
The selected contractor(s) will coordinate with City staff but training is not necessary at this time.

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 - current contractor is expected to continue services.

7. **Union Notification:** On 10/17/22, the Department notified the following employee organizations of this PSC/RFP request:

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

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

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

Address: 1 South Van Ness Avenue, 5th FL, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 31087 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

## Receipt of Modification Request to PSC # 31087 - 21/22 - MODIFICATIONS

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

on behalf of

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

Mon 10/17/2022 11:39 AM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$250,000 for services for the period July 1, 2023 – June 30, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrDrupal/node/19320>

Email sent to the following addresses: L21PSCReview@ifpte21.org  
amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org  
wendywong26@yahoo.com WendyWong26@yahoo.com junko.laxamana@sfgov.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN Dept. Code: ECN

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

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

Type of Service: Consulting - Economic Impact Analysis

Funding Source: Local general funds PSC Duration: 52 weeks

PSC Amount: \$100,000

**1. Description of Work**

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

OEWD seeks a qualified consultant (or team of consultants) to support an economic impact analysis, to inform the City's economic recovery efforts with respect to the COVID-19 pandemic. The goals of the analysis include:

- To determine changes to the economic make up of San Francisco's office core as a result of COVID-19 and how changes to employee commuting patterns will impact the viability and the space requirements of downtown offices and office-serving small businesses
- To assess San Francisco office core's competitiveness relative to other comparable markets within the State and nationally
- To identify the policies, programs, resources, and interventions required to maximize new entrants to the San Francisco office market as well as the adaptation and long-term robustness of San Francisco offices operating in the post-COVID economic context, and
- To identify the activities, uses, and incentives that will increase the motivation for employees and other stakeholders to choose to work and/or visit the downtown office core

The scope of this contract (or contracts) will include research tasks (surveys, interviews, stakeholder engagement) as well as impact analysis tasks, described below.

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

This service is necessary to ensure that the City's investments in economic recovery activities are coordinated and directly responsive to the needs of the City's workers and businesses. This contract (or contracts) will enable OEWD to gain insights into the future needs of businesses as a result of the COVID-19 pandemic as well as types of uses and amenities that will be compelling to draw a remote workforce into the office going forward.



C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.  
This service has not been provided in the past.

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

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

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

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

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

B. Explain the qualifying circumstances:

The skill sets needed for this scope of services are highly specialized, and the project is short-term.

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

A. Specify required skills and/or expertise: For Primary Research into the State of San Francisco Business and COVID Economic Impact scope (Research): Applicants must have at least 5 years of experience in performing survey work at a City scale Expertise and demonstrable success in comparable projects that include robust surveying efforts of San Francisco-based businesses For State of San Francisco Business and COVID Economic Impact Analysis scope (Impact Analysis): Applicants must have at least 5 years of experience in performing economic analysis for local government entities of a similar size/scale as San Francisco Expertise and demonstrable success in comparable projects that include analyzing a combination of primary and secondary economic data to assess and make recommendations about responding strategically to a rapidly changing economic context

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, this is not needed.

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

OEWD established a new division explicitly focused on economic recovery, and has consulted with multiple departments to determine whether existing staff have the capacity and expertise to conduct this work (including the Controller). Ultimately, it has been determined that an outside expert (or team of experts) would be best positioned to lead this short-term project, in coordination with relevant City stakeholders.

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

A. Explain why civil service classes are not applicable.  
This service is short-term and highly specialized.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Not at this time; this project is anticipated to be short-term.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. The selected contractor(s) will coordinate with City staff but training is not necessary at this time.

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

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

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

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

**7. Union Notification:** On 03/23/2022, 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: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 31087 - 21/22

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 05/05/2022

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 # 36826 - 18/19)

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

Type of Service: Consulting - Biennial Workforce Development Local Plan & WIOA Technical Assistance

Funding Source: Federal Dept of Labor & General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 09/01/18 - 09/30/21 (3 years 4 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 11/01/20-12/31/22 (1 year 13 weeks)

PSC Mod#2 Amount: \$100,000 PSC Mod#2 Duration: 01/01/23-12/31/26 (4 years 1 day)

PSC Cumulative Amount Proposed: \$200,000 PSC Cumulative Duration Proposed: 8 years 17 weeks

**1. Description of Work**

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

The Office of Economic and Workforce Development (OEWD) would like to contract with a consultant to provide project management, research, writing, and editing support to produce its mandated Local Workforce Development Plan Update mandated by the California Employment Development Department. Local Workforce Development Areas that administer Department of Labor (DOL) workforce dollars are required by Federal Workforce Innovation and Opportunity Act (WIOA) legislation to submit a Local Plan to the State Workforce Development Board (SWDB) every 4 years. The Plan describes the Local Area's workforce delivery principles and strategies for the subsequent years. The State Workforce Development Board issued directive WSD18-01 on July 27, 2018 requiring Local Workforce Development Boards to submit biennial updates, with the next due in March 2019. While the focus of this contract will be on the Local Plan, additional consulting needs related to WIOA-related DOL and SWDB directives issued within the contract term may be identified and negotiated as part of this contract.

Specifically, OEWD wishes to engage a consultant with expert-level knowledge of WIOA to ensure full compliance with all legal and technical requirements for subsequent revisions and updates to the Local Plan. Currently, it is expected that the work completed through this contract will enable the Department to manage biennial updates to the plan after the March 2021 plan is due, but the Department requests an additional 6 months of authority to transition this work (through September 2021) in the event that the Department of Labor requests clarification or resubmission of any documentation.

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

The Local Plan update must be submitted by the March deadline in order for OEWD to be eligible for continued federal WIOA funding. The Office of Economic and Workforce Development is responsible for over \$4 million in federal WIOA funding annually, the majority of which is contracted out to local nonprofit entities who administer essential workforce services to San Francisco residents and businesses. Denial of the needed consulting support risks successful completion of the federally required Local Plan and could put OEWD's federal funding at risk. Additionally, OEWD's Strategic Initiatives unit (the team responsible for preparing the Plan) is currently severely understaffed, operating at less than 50% capacity: out of a team of six, one was hired within the past month, one is a temporary employee whose position permanently ends in August 2018, and three vacant positions are in the early stages of the hiring process with anticipated late 2018/early 2019 start dates. Internal OEWD staff from other units have been engaged to support specific areas of the Local Plan, but OEWD needs this short-term, focused support from an expert in the field to bolster capacity, improve consistency, transmit historical knowledge, and complete the required Local Plan by the mandated deadline.

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

Yes

D. Will the contract(s) be renewed?

Unknown at this time.

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

The State Workforce Development Board issued directive WSDD216 in September 2020 requiring Local Workforce Development Boards to submit biennial updates, with the next due in April 2021. This results in the need for ongoing technical support and expertise in order to comply with the State and Federal Workforce Investments and Opportunities Act (WIOA) requirements. Federal WIOA funding provides over \$6 million annually to OEWD, which is largely contracted out to local nonprofits to administer workforce programming. In addition, OEWD has re-procured the services through RFQ 214.

## 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).

Explain the qualifying circumstances:

The scope of work is short-term and periodic, based on the biennial reporting updates required by the Department of Labor via the State Workforce Development Board.

B. Reason for the request for modification:

This modification requests an additional 4 years beyond the existing 5.5-year authorization, with \$100,000 in additional funding. Although the understaffing issue has been resolved, the specific expertise provided under this PSC is necessary in order to comply with the Federal Local Plan requirements.

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

A. Specify required skills and/or expertise: The Plan must be prepared in strict adherence to Workforce Innovation and Opportunities Act (WIOA) guidelines and State directives, requiring a high level of workforce development expertise, familiarity with workforce development legislation, and knowledge of strategic planning methodology. In addition to coordinating the submission of the updated Local plan, the consultant's expertise will be used to assist with responding to any clarifying questions from the State, subsequent to submission.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I; 0923, Manager II;

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 project is time-limited and periodic, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No; the scope of this project is time-limited and requires specific skills.

## 6. **Additional Information**

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

No.

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

Contractor will work closely with OEWD's Strategic Initiatives Director (0922) who will oversee the contractor's work. Additionally, the contractor will coordinate and consolidate input from several OEWD units, including Program Operations, Business Services, and CityBuild, and fully engage staff in the process so that they can benefit from a knowledge transfer of relevant content and methodologies. The number of training hours will be contingent on the depth of involvement for each unit, with the majority of training being provided to existing Strategic Initiatives staff. Staff classifications within the above mentioned units may include 9704, 9705, 9706, 9774, 9775, 1824 and 0922.

- 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.  
Extension of contract with Racy Ming Associates LLC

**7. Union Notification:** On 10/18/22, the Department notified the following employee organizations of this PSC/RFP request:  
Municipal Executive Association;

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# 36826 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

## Receipt of Modification Request to PSC # 36826 - 18/19 - MODIFICATIONS

dhr-psccordinator@sfgov.org

on behalf of

Jenny.Collins@sfgov.org

Tue 10/18/2022 1:15 PM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; Criss@sfmea.com <Criss@sfmea.com>; camaguey@sfmea.com (contact) <camaguey@sfmea.com>; christina@sfmea.com <christina@sfmea.com>; staff@sfmea.com <staff@sfmea.com>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$100,000 for services for the period January 1, 2023 – December 31, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/15657>

Email sent to the following addresses: staff@sfmea.com Christina@sfmea.com Camaguey@sfmea.com Criss@SFMEA.com junko.laxamana@sfgov.org

# **Additional Attachment(s)**



# Request for Qualifications #214

**City and County of San Francisco**

Office of Economic and Workforce Development

*for*

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



# Request for Qualifications #214

Date of Issue: Wednesday, February 26, 2020

**Deadline for Responses:  
Thursday, April 9, 2020 by 5:00 PM**

**1 complete response package may be submitted via email to  
[oezd.procurement@sfgov.org](mailto:oezd.procurement@sfgov.org)**

**(Preferred Method)**

**OR**

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

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

Attention: Marissa Bloom, Contracts and Grants Administrator (RFQ 214)

HAND DELIVERY RECOMMENDED IF SUBMITTING HARD COPY

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## A. Background

The City and County of San Francisco's Office of Economic and Workforce Development (OEWD) advances equitable and shared prosperity for San Franciscans by growing sustainable jobs, supporting businesses of all sizes, creating great places to live and work, and helping everyone achieve economic self-sufficiency. OEWD programs are responsible for strengthening San Francisco's many diverse neighborhoods and commercial corridors, creating a business climate where companies can grow and prosper, and ensuring a continually high quality of life for all San Franciscans.

OEWD provides one point of contact for a variety of essential City programs and services, to include:

- Business attraction and retention, with an emphasis on key industry clusters
- Small business assistance and nonprofit support
- Workforce development, including job training for today's jobs and tomorrow's opportunities
- Public and private projects such as affordable housing, job creation, economic development, and open space creation and management
- Neighborhood development, including commercial corridor stabilization and revitalization
- Film and television production
- International trade and commerce, fostering Sister Cities and increasing business opportunities

Through this Request for Qualifications (RFQ), OEWD seeks to develop a list of qualified contractors to provide a variety of consulting services, with a focus on advancing equity and shared prosperity for all residents.

## B. Project Descriptions

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

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

Area number	Title	Subsections/Categories
Area 1	Leadership and Professional Development Services	None
Area 2	Real Estate Case Management Services	None
Area 3	Small Business Consulting and Training Services through the SBDC	Yes; subsections a. through g.
Area 4	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 5	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 6	Videography Services	None
Area 7	Fiscal Services	None
Area 8	Grant Development Services	None
Area 9	Research and Evaluation of Workforce Development Programs	Yes; subsections a. through c.
Area 10	Planning and Designing Workforce Services	None

<b>Area 11</b>	<b>Developing and Implementing a Racial Equity, Diversity and Inclusion Plan</b>	<b>Yes; subsections a. through d.</b>
<b>Area 12</b>	<b>Community Outreach and Education Services</b>	<b>None</b>
<b>Area 13</b>	<b>Community Benefit District/Business Improvement District</b>	<b>None</b>
<b>Area 14</b>	<b>Architectural Services</b>	<b>None</b>
<b>Area 15</b>	<b>Logo/Branding Design</b>	<b>None</b>
<b>Area 16</b>	<b>Tenant Coordination/Program Management</b>	<b>None</b>
<b>Area 17</b>	<b>Development Agreement Obligation Tracking System</b>	<b>None</b>

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

**C. RFQ Timeline**

RFQ Issued	<b>Wednesday, February 26, 2020</b>
Bidders Conference	Tuesday, March 10, 2020 at 3:30 PM (SEE DETAILS BELOW)
Question submission period ends	Thursday, March 12, 2020 at 5:00 PM
Final questions and answers posted	By close of business Friday, March 13, 2020
Proposals Due (no exceptions)	Thursday, April 9, 2020 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Monday, April 20, 2020
Appeal Period Ends (no exceptions)	Five (5) calendar days after notification date

This RFQ will be in effect for two years from the date that notifications are sent to proposers. OEWD may use this RFQ to justify contracts/grants with a term start date within the two year timeframe and for any necessary amendments to those agreements. The term of any agreements (and their amendments) do not need to conclude within the two year timeframe.

Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #210 in Fall 2018 do not need to reapply to this RFQ unless they wish to also prequalify themselves for the additional project areas outlined on the following pages or reapply under similar areas to extend their prequalified status. The list of prequalified firms created through RFQ 210 will be active until December 2020.

**Schedule may change if necessary.**

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214>. It is the proposer's responsibility to review all changes posted and adjust responses as needed.

## **D. Respondents' Questions**

OEWD will hold a Bidders Conference to review program needs and expectations for interested respondents, and to provide clarity on the application and evaluation processes. Though not required, interested parties are encouraged to attend the Bidders Conference. This meeting is scheduled for:

**DATE:** Tuesday, March 10, 2020  
**TIME:** 3:30 PM – 5:00 PM  
**LOCATION:** Please click here to access the  
**Webinar:** <https://norcalbdc.zoom.us/j/659267496>  
**Meeting ID:** 659 267 496

If you require an accommodation due to a disability, please contact 415-701-4848 or TDD 800-735-2929 (CRS), or email [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) at least 3 business days prior to the meeting to ensure availability.

Respondents may additionally request clarification or ask questions about this solicitation by emailing [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) through **Thursday, March 12, 2020 at 5:00 PM** (preferred method). Respondents may alternatively drop off written questions to the Office of Economic and Workforce Development, 1 South Van Ness Avenue 5th Floor, San Francisco, CA before the deadline noted above. No phone or fax questions will be answered.

A consolidated list of questions and answers will be posted to the RFQ 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214> no later than end of day **Friday, March 13, 2020**. Periodic posting of questions and answers may occur prior to that deadline. Proposers are responsible to review the website periodically and incorporate guidance as appropriate.

## E. Scope of Work

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

### 1. Leadership and Professional Development Services

OEWD is seeking the expertise of a qualified consultant to support organizational development, individual leadership enhancement and growth of highly functional teams within the department. The selected consultant will provide on call organizational development and executive coaching services, including but not limited to, working with OEWD staff to assess, clarify, and synchronize various viewpoints that align with OEWD's strategic plan and vision, provide executive coaching to individuals and teams, and facilitate team building activities to promote growth and better communication within the agency.

Activities under this section may include:

- On call evaluation, learning and training services in leadership development, team development, systems integration, performance evaluation, feedback and enhancement, communication techniques and strategies for successful project management and team engagement.
- Providing tools, which should be intuitive and simple to use, to members of the OEWD executive team to use to continue organizational development with their staff, and training for OEWD staff in the use of those tools
- Facilitation services and executive coaching to support culture change within OEWD
- Reports, presentations, or other activities for OEWD staff, boards/commissions and stakeholders, as determined by OEWD.

#### Minimum Qualifications:

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

#### Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- Experience working with government agencies or municipalities
- Experience working with diverse groups of stakeholders and executives with varying management styles

#### Supplementary Questions and Requirements:

No supplemental information or questions are required.

### 2. Real Estate Case Management Services

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

Activities under this section may include:



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

Minimum Qualifications:

- At least 3 years of experience providing real estate or broker services for commercial properties.
- Success providing real estate services to small businesses with varying needs.
- Experience working in San Francisco neighborhood commercial real estate market

Preferred Qualifications:

- California licensed real estate broker

Supplementary Questions and Requirements:

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

### 3. Small Business Consulting and Training Services through the SBDC

The San Francisco Small Business Development Center (SBDC), a program within OEWD, is seeking business consultants to provide business counseling and training services.

Specifically, SBDC is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations:

- a. **Financial Management;** including, but not limited to:
  - Loan Packaging
  - Financial Analysis
  - Profitability Tactics
  - Financing/Capital
  - Grant Writing
- b. **Marketing and Sales;** including, but not limited to:
  - Advertising, Sales And Branding

- Customer Creation And Retention
- Marketing Strategy
- E-Commerce
- Web And Graphic Design
- Visual Merchandizing
- Social Media Management
- c. **Legal Support**; including, but not limited to:
  - Commercial Lease Negotiations
  - Small Business Establishment And Formation
  - Franchising
  - Human Resource Management
- d. **Accounting**; including, but not limited to:
  - Accounting And Bookkeeping
  - Business Taxes
- e. **Procurement**; including, but not limited to:
  - Certifications
  - Government Contracting
  - Corporate Contracting
- f. **Management/Operations**; including, but not limited to:
  - Inventory Management
  - Restaurant Management
  - Grocery Store Management
  - Industry Specific Expertise (I.E. Manufacturing, Retail, Hospitality...Etc.)
- g. **Other**; including, but not limited to:
  - Product Development
  - Space Planning And Analysis
  - Technology
  - Importing/Exporting
  - Commercial Real Estate

Activities under this section may include:

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

Additional information for this Section:

- Services may be required to be provided in a variety of languages including Spanish, Tagalog (Filipino), Traditional Chinese, and other languages as needed.
- Some services may be required to be provided in the evenings or on weekends to accommodate client needs.
- The SBDC has a standard \$75 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hour)

Minimum Qualifications:

- 3 years verifiable experience providing business consulting and training services to small business clients and a minimum of 5 small business clients consulted and/or trained

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, as part of the response package.

1. Explain your ability to develop and conduct training programs.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings. Please provide specifics related to all subareas (A-G) under which you would like this application to be considered.
3. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
4. Indicate the languages you speak and the proficiency with which you speak them:
  - a. Level 1 – Elementary proficiency
  - b. Level 2 – Limited working proficiency
  - c. Level 3 – Professional working proficiency
  - d. Level 4 – Full professional proficiency
  - e. Level 5 – Native or bilingual proficiency
5. Describe your rapport or approach with clients. How do you communicate effectively with entrepreneurs and engage the cooperation of business owners in the implementation process?
6. Describe your success in helping business clients accomplish specified goals.
7. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$75 per hour?
  - a. Yes
  - b. Yes for some but not all contracts (Please answer question below)
  - c. No (Please answer question below)
    - i. If you are not willing to be compensated in accordance with SBDC's standard hourly rate of \$75 per hour, what is your blended hourly rate?

**4. Employment Training Panel (ETP) Technical Assistance and Management**

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

Activities under this section may include:

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training.

- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.
- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.
- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their

Minimum Qualifications:

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

Preferred Qualifications:

- Specific workforce development related experience is highly desirable.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

**5. Marketing, Branding, Collateral and Website Development**

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

Activities under this section may include:

- a. Analyzing stakeholders and how they affect messaging across all channels (website, print collateral, social media, etc.).
- b. Analyzing and providing recommendations about how, through messaging and information design, OEWD can create better access to OEWD services for San Francisco residents, including underserved populations. This may include strategy for creating print and web materials that are user/customer focused. Provide OEWD with manual of best practices on how to create user/customer centered content.
- c. Designing research and analysis to better understand our customers/clients, including current challenges and barriers, socioeconomic context, etc.
- d. Data visualization

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

Minimum Qualifications:

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

Supplementary Questions and Requirements:

No supplemental information or questions are required.

**6. Videography Services**

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

Activities under this section may include:

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

Minimum Qualifications:

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

Preferred Qualifications:

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

Supplementary Questions and Requirements:

No supplemental information or questions are required.

## **7. Fiscal Services**

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

Activities under this section may include:

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

- Summarizing methods of implementing proposed recommendations, ways to measure progress, and provide updates including specifying persons responsible, timeframes, and measurable objectives.

Minimum Qualifications:

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

Supplementary Questions and Requirements:

No supplemental information or questions are required.

## **8. Grant Development Services**

OEWD seeks consultants to assist with grant development and program sustainability planning with a focus on prospect research, program development, and proposal writing.

Activities under this section may include:

- Sector programming sustainability including strategy development, service and training system analysis, and program design analysis.
- Sector assessment including developing criteria for selecting sectors, researching labor markets, and identifying demand for workers.
- Sustainability planning for current and/or future OEWD programs.
- Working with OEWD to identify grants and funding resources to support OEWD current and/or future programs and services.
- Writing grant proposals and coordinating with OEWD partners.

Minimum Qualifications:

- At least 5 years verifiable experience in providing similar services as those noted in the application area above, with at least 3 projects completed within the past 10 years.
- At least 3 years verifiable experience in providing the services noted in the application area above in one or more of OEWD's areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- A proven track record of success in winning or assisting others to win competitive procurements or grants.

Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- At least 3 years of experience working with state and federal grant solicitations.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) "Statement of Contracts", must include a description of at least three (3) projects that the organization has worked on within the past 10 years, providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies your firm employed to complete the projects.

## **9. Research and Evaluation of Workforce Development Programs**

OEWD seeks consultant(s) to provide research and evaluation services for City of San Francisco staff members, property and business owners, Community Based Organizations, and other organizations on an as-needed basis. OEWD tracks the effectiveness of programming and tests, implements, and recommends new and emerging workforce development programs, tools, and policies for the San Francisco Workforce Development System. In pursuit of this mission, OEWD seeks skilled researchers and evaluators to explore topics related to workforce innovation and performance.

Activities under this section may include:

- a. Research services, including
  - Design and review of research proposals;
  - Qualitative research;
  - Quantitative research;
  - Participatory research;
  - Technical assistance on research and methodology;
  - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
  - Peer review of research conducted by OEWD staff.
- b. Evaluation and program design services, including
  - Design and review of evaluation frameworks and plans, including program logic models and key performance indicators;
  - Technical assistance on programs, tools, and policies;
  - Formative evaluation;
  - Summative evaluation;
  - Cost-benefit analysis;
  - Meta-analysis;
  - Design randomized control trials to measure policy and program impact;
  - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
  - Peer review of evaluation protocols conducted by staff.
- c. Professional development services related to research and evaluation, including
  - Developing training resources and/or delivering training on research design, research methodology, evaluation design, and evaluation methodology, and



- Developing training resources and/or delivering training on survey design and data collection, data processing, data analysis, data mining, statistical analysis, data linkages and data management with emphasis on longitudinal and/or departmental data sets.

Minimum Qualifications:

- Minimum of (5) years verifiable experience providing similar services as those noted in the application area.
- Project Lead has a Master's or Ph.D. in research and evaluation, public policy, public administration, economics, education, social welfare, or other applicable focus area.

Preferred Qualifications:

- Verifiable ability to manage research projects within time and financial constraints.
- Project Lead has a peer-reviewed publication demonstrating research and evaluation skills.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

**10. Planning and Designing Workforce Services**

OEWD seeks consultants to provide support in planning and designing workforce services, including advising on:

- Customer-centered approaches to defining user segments, including participants, industry advisors, and employers; customer and employer engagement. Infrastructure for collection and analysis of real-time data from industry, educational partners, service providers, and the broader labor market.
- Planning and design of system infrastructure that encourages stakeholder collaboration, experimentation, user feedback, and user/customer-centered design.
- Identifying and prioritizing opportunities to improve the public workforce system.
- Designing, developing, deploying, and evaluating workforce tools.
- Developing workforce partnerships and collaborations.
- Design thinking strategies, including empathic discovery, creative problem solving, prototyping and customer-centered research processes.
- Accelerated learning and skills development.
- General workforce focused and sector contextualized curriculum development.
- Career and education assessment and planning.
- Project based and on-site learning models.
- Linking learning and work.
- Workforce Innovation and Opportunity Act regulation technical assistance
- Workforce policy analysis and technical assistance

Activities under this section may consist of:

- Identification of stakeholders; collecting input and providing analysis on preliminary goals from stakeholders.
- Collecting data on strategies, strengths, weaknesses, and opportunities.
- Identifying and working toward decision points/priorities, outcomes, timeline, and project deliverables.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and providing updates including specifying persons responsible, timeframes, and measurable objectives.
- Leading rapid prototyping sessions and design processes.
- Leading and conducting customer-centered research projects.
- Creating experience maps.

Minimum Qualifications:

- 5 years verifiable experience providing similar services as those noted in the application area

Preferred Qualifications:

- Specific workforce development related experience is highly desirable

Supplementary Questions and Requirements:

No supplemental information or questions are required.

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

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

Activities under this section may include:

### **a. Assessment and Evaluation**

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

## **b. Plan Development**

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

## **c. Training and Facilitation**

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

## **d. Implementation**

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

### Minimum Qualifications:

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

### Preferred Qualifications:

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

### Supplementary Questions and Requirements:

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

## **12. Community Outreach and Education Services**

OEWD seeks consultants to assist with community outreach and education services to inform and gather input from residents regarding OEWD programs, services, and events.

Activities under this section may include:

- Promoting OEWD programs, services, and events door-to-door, publicly, in meetings, online, through social media, in print, and through other methods of outreach.

- Organizing community meetings and listening sessions to discuss OEWD programs and services.
- Participating in community meetings to educate groups and individuals about OEWD programs and services
- Assisting with OEWD-hosted public events by supporting guest registration, providing helpful information, troubleshooting, providing programming, helping with logistics, and any other task required for successful events.
- Educating community members about OEWD programs and services, as well as OEWD partnerships such as Opportunities for All.
- Developing and helping develop marketing collateral that can be used to increase awareness of OEWD programs, services, and events.

Minimum Qualifications:

- At least 3 years verifiable experience in providing similar services as those noted in the application area above.
- At least 2 years verifiable experience in providing the services noted in the application area above in one or more of OEWD’s areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- At least 1 year verifiable experience in providing similar services as those noted in the application area above in the City and County of San Francisco.

Preferred Qualifications:

- At least 2 years verifiable experience providing the services noted in the application area above to San Francisco’s disadvantaged and underrepresented communities and community members.
- At least 1 year verifiable experience providing the services noted in the application area above in multiple languages.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) “Statement of Contracts”, must include a description of at least 3 projects or contracts that the organization has worked on in the past in providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies the organization employed to complete the projects.

**13. Community Benefit District/Business Improvement District**

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

Activities under this section may include:

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

Minimum Qualifications:

- A strong track record of forming and/or managing CBDs/BIDs in San Francisco and/or the State of California
- Previous experience in strategic planning
- Previous experience in reporting the impact and effectiveness of CBDs/BIDs or citywide related programs

Preferred Qualifications:

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

Supplementary Questions and Requirements:

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

## **14. Architectural Services**

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

Activities under this section may include:

- Attend meetings with small business owners and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Review historic information, reports, previous building permits and planning requirements for each project. Conduct field measurements and photographing existing conditions.
- Work with OEWD staff and applicant to develop a minimum of two conceptual designs for the improvements.
- Create design development and construction documents drawings. Coordinate revisions with OEWD staff, applicant and Department of Building Inspection (DBI).
- Obtain all required building permit approvals.

- Develop a scope of work for bidding; attend contractors' walk-through; provide assistance during the bidding phase including responding to questions from contractors.
- Review bids and assisting OEWD staff to provide recommendations on choosing lowest price qualified contractor.
- Provide construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answer questions from contractors and OEWD staff.
- Conduct final walk-through with OEWD staff, contractor and applicant upon project completion. Inspect the work for compliance with applicable City guidelines and signing the Certificate of Completion.

Minimum Qualifications:

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

Preferred Qualifications:

- Experience working with small business owners unfamiliar with the design process

Supplementary Questions and Requirements:

No supplemental information or questions are required.

**15. Logo/Branding Design**

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

Activities under this section may include:

- Attend meetings with the business/applicant and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.

- Research and evaluate the business concept, customer perception, and other brands in the field.
- Work with OEWD staff and the business/applicant to develop a minimum of 3 conceptual designs for a visual identity that could include logos, color schemes, signage, and environmental graphics.
- Submit digital files of all designs and a visual identity guideline document for the business.
- Communicate with contractors to specify design and material.
- Providing before and after high quality photographs of the project.

Minimum Qualifications:

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

Supplementary Questions and Requirements:

No supplemental information or questions are required.

**16. Tenant Coordination/Program Management**

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

Activities under this section may include:

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

- Leverage existing programs to remove leasing barriers and incentivize business owners and property owners to agree to lease terms.

Minimum Qualifications:

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

Preferred Qualifications:

*Building Assessments*

- Certified commercial property inspector with experience in California.

*Real Estate Services*

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

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, as part of the response package

1. Describe a program or project you have managed that involves multiple stakeholders and involves real estate matters.
2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
5. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

**17. Development Agreement Obligation Tracking System**

OEWD seeks consultants to create a modern, user-friendly, automated, and elegant digital solution to track project development and developer obligations as stated in Development Agreements (DAs). DAs are legal agreements between the City and private entities approved by the Board of Supervisors that lay out numerous obligations on the part of the developer and the City. The technological solution should have the following characteristics at minimum:



1. Be easy to use for the front-end users and for back end data maintenance;
2. Be easy and low cost to learn and maintain over time;
3. Be developed on the City's SharePoint platform or be a better stand-alone solution, or compatibly integrated with SharePoint where user needs dictate;
4. Start with an existing DA Monitoring staff spreadsheets and workflows of summarized obligations in excel spreadsheets;
5. Include a set of automatic reports designed and developed for specific reporting requirements, using both web-based access with digital visualization and PDFs for easy distribution;
6. Be accessed automatically over the Web with APIs as well as import/export data to other commonly-used data management programs (e.g., Excel) and to include geospatial identifiers (e.g., parcel numbers, digitized project boundary, and land use plan);
7. If practical, capacity to leverage the investment in this digital monitoring tool by being easily used or integrated through data services with other city users, data on land use, total units approved and built, by type, location and timing.

To this end, OEWD seeks to partner with the SF Planning Department to develop a database linked with services that can report out via a website on the status of obligations associated with approved agreements, for enhanced tracking and enforcing of DA obligations. In order to be effective as a tool for monitoring and enforcing DAs, the system should include a database management system that has several characteristics. Specifically, the database should:

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

Activities under this section may include:

- Scoping meetings: Conduct one-on-one technical sessions with staff from OEWD and SF Planning Department and six to eight participating agencies to develop custom applications and functions/procedures for the purpose of interfacing with a centralized database for tracking and enforcing the conditions, requirements, mitigations, and obligations.
- Building the tracking system: Working directly with an OEWD project manager and the SF Planning Development Performance Coordinator, create the system and make adjustments, as necessary. Assist with integration directly with FAMIS/FSP, Accela PPTS, mapping software, City Outlook Directory, and other applicable systems, as necessary, or indirectly through data exporting/importing. Create and adhere to a project schedule for building and launching this system.
- Roll-out: Launch the new DA Obligations Tracking System. Provide on-going support and development through beta-testing. Designing maintenance protocols: Draft protocols for OEWD and other stakeholders to utilize after roll-out stage. Develop department-specific work

flows for custom reporting and automation of tasks. Create security and access controls to allow for the adequate preservation of integrity of inputted data. Build document management capabilities to upload and retrieve relevant files. Additional information for this Section: Applicants should demonstrate in their response the following specifics:

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

Minimum Qualifications:

- Demonstrated experience in providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar obligation-tracking systems/databases, especially with Microsoft SharePoint and/or Access, that are elegant, easy to learn and use, and low cost for the tool's on-going maintenance.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

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 # 36826 - 18/19)

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

Type of Service: Consulting - Biennial Workforce Development Local Plan & WIOA Technical Assistance

Funding Source: Federal Dept of Labor & General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 09/01/18 - 09/30/21 (3 years 4 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 11/01/20-12/31/22 (1 year 13 weeks)

PSC Cumulative Amount Proposed: \$100,000 PSC Cumulative Duration Proposed: 4 years 17 weeks

**1. Description of Work**

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

The Office of Economic and Workforce Development (OEWD) would like to contract with a consultant to provide project management, research, writing, and editing support to produce its mandated Local Workforce Development Plan Update mandated by the California Employment Development Department. Local Workforce Development Areas that administer Department of Labor (DOL) workforce dollars are required by Federal Workforce Innovation and Opportunity Act (WIOA) legislation to submit a Local Plan to the State Workforce Development Board (SWDB) every 4 years. The Plan describes the Local Area's workforce delivery principles and strategies for the subsequent years. The State Workforce Development Board issued directive WSD18-01 on July 27, 2018 requiring Local Workforce Development Boards to submit biennial updates, with the next due in March 2019. While the focus of this contract will be on the Local Plan, additional consulting needs related to WIOA-related DOL and SWDB directives issued within the contract term may be identified and negotiated as part of this contract.

Specifically, OEWD wishes to engage a consultant with expert-level knowledge of WIOA to ensure full compliance with all legal and technical requirements for subsequent revisions and updates to the Local Plan. Currently, it is expected that the work completed through this contract will enable the Department to manage biennial updates to the plan after the March 2021 plan is due, but the Department requests an additional 6 months of authority to transition this work (through September 2021) in the event that the Department of Labor requests clarification or resubmission of any documentation.

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

The Local Plan update must be submitted by the March deadline in order for OEWD to be eligible for continued federal WIOA funding. The Office of Economic and Workforce Development is responsible for over \$4 million in federal WIOA funding annually, the majority of which is contracted out to local nonprofit entities who administer essential workforce services to San Francisco residents and businesses. Denial of the needed consulting support risks successful completion of the federally required Local Plan and could put OEWD's federal funding at risk. Additionally, OEWD's Strategic Initiatives unit (the team responsible for preparing the Plan) is currently severely understaffed, operating at less than 50% capacity: out of a team of six, one was hired within the past month, one is a temporary employee whose position permanently ends in August 2018, and three vacant positions are in the early stages of the hiring process with anticipated late 2018/early 2019 start dates. Internal OEWD staff from other units have been engaged to support specific areas of the Local Plan, but OEWD needs this short-term, focused support from an expert in the field to bolster capacity, improve consistency, transmit historical knowledge, and complete the required Local Plan by the mandated deadline.

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

Yes

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

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

The State Workforce Development Board issued directive WSDD216 in September 2020 requiring Local Workforce Development Boards to submit biennial updates, with the next due in April 2021. This results in the need for ongoing technical support and expertise in order to comply with the State and Federal Workforce Investments and Opportunities Act (WIOA) requirements. Federal WIOA funding provides over \$6 million annually to OEWD, which is largely contracted out to local nonprofits to administer workforce programming. In addition, OEWD has re-procured the services through RFQ 214.

**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).

Explain the qualifying circumstances:

The scope of work is short-term and periodic, based on the biennial reporting updates required by the Department of Labor via the State Workforce Development Board.

B. Reason for the request for modification:

This modification requests an additional 2.25 years beyond the existing 3-year authorization, with no additional funding. Although the understaffing issue has been resolved, the specific expertise provided under this PSC is necessary in order to comply with the Federal Local Plan requirements.

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

A. Specify required skills and/or expertise: The Plan must be prepared in strict adherence to Workforce Innovation and Opportunities Act (WIOA) guidelines and State directives, requiring a high level of workforce development expertise, familiarity with workforce development legislation, and knowledge of strategic planning methodology. In addition to coordinating the submission of the updated Local plan, the consultant's expertise will be used to assist with responding to any clarifying questions from the State, subsequent to submission.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I; 0923, Manager II;

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 project is time-limited and periodic, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No; the scope of this project is time-limited and requires specific skills.

**6. Additional Information**

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

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

Contractor will work closely with OEWD's Strategic Initiatives Director (0922) who will oversee the contractor's work. Additionally, the contractor will coordinate and consolidate input from several OEWD units, including Program Operations, Business Services, and CityBuild, and fully engage staff in the process so that they can benefit from a knowledge transfer of relevant content and methodologies. The number of training hours will be contingent on the depth of involvement for each unit, with the majority of training being provided to existing Strategic Initiatives staff. Staff classifications within the above mentioned units may include 9704, 9705, 9706, 9774, 9775, 1824 and 0922.

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

**7. Union Notification:** On 10/21/20, the Department notified the following employee organizations of this PSC/RFP request:  
Municipal Executive Association;

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# 36826 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 10/28/2020

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 # 49873 - 18/19)

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

Type of Service: Consulting - Workforce Technical Assistance and Training

Funding Source: General Fund

PSC Original Approved Amount: \$450,000 PSC Original Approved Duration: 04/01/19 - 06/30/23 (4 years 13 weeks)

PSC Mod#1 Amount: \$500,000 PSC Mod#1 Duration: 07/01/23-06/30/27 (4 years 1 day)

PSC Cumulative Amount Proposed: \$950,000 PSC Cumulative Duration Proposed: 8 years 13 weeks

**1. Description of Work**

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

The Office of Economic and Workforce Development (OEWD) seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming. Activities may include the following:

Workforce Development and Design: Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed. Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning assessments, apprenticeship, learning labs and learning networks, and innovation process strategies.

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

Training of Best Practices in Workforce Development: Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas: Client customer service - motivational interviews and strength-based interviews; effective case management to enhance participant success; competency based assessments; retention best practices; strategies for effective job development and employer engagement; strategies to utilize external resources outside of workforce system to support clients; using Labor Market Information (LMI) to best inform programming; common measures to identifying 'job readiness' across workforce system; innovation in incentivizing participants to submit required documentation (i.e. employment/education verification); employment matching based on skills, interests and sustainable wage occupations; and strategies for removing employment barriers.

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

Technical assistance and training for OEWD's Workforce System service providers is pivotal in ensuring that program staff have the knowledge and resources necessary to properly address the needs of our job seeker and employer communities. Denial of this request will result in reduced efficacy of our programs.

**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 modification would continue existing services.

D. Will the contract(s) be renewed?

Unknown at this time.

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

The demand for these services is ongoing and longer than originally anticipated due to evolving state and federal policy directives which prioritize provider technical assistance and training on best practices. The department identified that local implementation of these state and federal policy directives is best accomplished by a neutral, third party facilitator for workforce development design, technical assistance on regulatory compliance, and training on workforce best practices.

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

A. Display all that apply

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

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

Explain the qualifying circumstances:

Services will be provided on a periodic basis, depending on the need for training. The Contractor must have specific skills that are not currently available within the Department.

B. Reason for the request for modification:

Request to add \$500,000 and 4 years. The demand for these services is ongoing and longer than originally anticipated due to evolving state and federal policy directives which prioritize provider technical assistance and training on best practices. The department identified that local implementation of these state and federal policy directives is best accomplished by a neutral, third party facilitator for workforce development design, technical assistance on regulatory compliance, and training on workforce best practices.

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

A. Specify required skills and/or expertise: The following specific skills in regards to capacity building and training around workforce development are required: A successful track record providing assistance to workforce community organizations; success in increasing capacity of community organizations and their staff; a successful track record working with low-capacity organizations; a successful track record providing trainings on workforce best practices; a successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies; and experience in developing and facilitating training curriculum around workforce development best practices.

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This project is periodic and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, because this is a periodic project which requires specific skills.

**6. Additional Information**

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

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No direct training will be provided, but Contractor will be supporting OEWD Program Operations Director (0923) and staff (9772, 9774, 9775) to provide training to workforce system community based partners.
- 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 - this extension is a continuation of existing work.

**7. Union Notification:** On 10/17/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49873 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022



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

## Receipt of Modification Request to PSC # 49873 - 18/19 - MODIFICATIONS

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

on behalf of

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

Mon 10/17/2022 11:44 AM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$500,000 for services for the period July 1, 2023 – 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/19321>

Email sent to the following addresses: L21PSCReview@ifpte21.org  
amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org  
wendywong26@yahoo.com WendyWong26@yahoo.com junko.laxamana@sfgov.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN

Dept. Code: ECN

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

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

Type of Service: Consulting - Workforce Technical Assistance and Training

Funding Source: General Fund

PSC Duration: 4 years 13 weeks

PSC Amount: \$450,000

**1. Description of Work**

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

The Office of Economic and Workforce Development ("OEWD") seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming. Activities may include the following:

Workforce Development and Design: Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed. Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning assessments, apprenticeship, learning labs and learning networks, and innovation process strategies.

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

Training of Best Practices in Workforce Development: Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas: Client customer service - motivational interviews and strength-based interviews; effective case management to enhance participant success; competency based assessments; retention best practices; strategies for effective job development and employer engagement; strategies to utilize external resources outside of workforce system to support clients; using Labor Market Information (LMI) to best inform programming; common measures to identifying "job readiness" across workforce system; innovation in incentivizing participants to submit required

documentation (i.e. employment/education verification); employment matching based on skills, interests and sustainable wage occupations; and strategies for removing employment barriers.

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

Technical assistance and training for OEWD's Workforce System service providers is pivotal in ensuring that program staff have the knowledge and resources necessary to properly address the needs of our job seeker and employer communities. Denial of this request will result in reduced efficacy of our programs.

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.

Capacity building efforts were once provided through OEWD's Strategic Initiative's team to build capacity of program staff, but the team no longer has the ability to meet the demand for services.

D. Will the contract(s) be renewed?

Unknown at this time.

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

not applicable

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

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

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

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

B. Explain the qualifying circumstances:

Services will be provided on a periodic basis, depending on the need for training. The Contractor must have specific skills that are not currently available within the Department.

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

A. Specify required skills and/or expertise: The following specific skills in regards to capacity building and training around workforce development are required: A successful track record providing assistance to workforce community organizations; success in increasing capacity of community organizations and their staff; a successful track record working with low-capacity organizations; a successful track record providing trainings on workforce best practices; a successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies; and experience in developing and facilitating training curriculum around workforce development best practices.

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;

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

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

This work is exclusive to workforce development and developing the capacity of our community based partners through training, and we have not found departments besides OEWD carrying out this type of work.

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

A. Explain why civil service classes are not applicable.

This project is periodic and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, because this is a periodic project which requires specific skills.

**6. Additional Information**

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

No.

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

No. No direct training will be provided, but Contractor will be supporting OEWD Program Operations Director (0923) and staff (9772, 9774, 9775) to provide training to workforce system community based partners.

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 01/31/2019, 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: 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# 49873 - 18/19

DHR Analysis/Recommendation:

action date: 04/15/2019

Commission Approval Required

Approved by Civil Service Commission

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request:  Initial  Modification of an existing PSC (PSC # 46770 - 19/20)

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

Type of Service: Consultation, Technical Assistance, Meeting Facilitation

Funding Source: Federal

PSC Original Approved Amount: \$198,000 PSC Original Approved Duration: 01/01/21 - 09/30/22 (1 year 38 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 01/12/22-06/30/24 (1 year 39 weeks)

PSC Mod#2 Amount: \$150,000 PSC Mod#2 Duration: 08/30/22-06/30/25 (1 year)

PSC Cumulative Amount Proposed: \$348,000 PSC Cumulative Duration Proposed: 4 years 25 weeks

**1. Description of Work**

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

Assist CalWORKs to complete the components of Cal-OAR (CalWORKs Outcome and Accountability Review), a State of California mandated project. Proposed works are as follow: (1) review of the current system and, (2) development of a system improvement plan.

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

This service is necessary because Cal-OAR is a State of California mandated project. Not completing the project will cause the CalWORKs program to fall out of compliance.

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

Services have been provided in the past through earlier PSC request. See 46770 - 19/20

D. Will the contract(s) be renewed?

No, the contract will not be renewed, as this is a one-time only project.

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

N/A (This project is less than 5 years.)

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

A. Display all that apply

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

Explain the qualifying circumstances:

This is a short term project of about 3 years that requires specific skills in stakeholder outreach and engagement, assistance to compile and report on stakeholder feedback, and integrate feedback effectively in the reports and CQI processes as required by the project.

B. Reason for the request for modification:

Service being continued due to pandemic and adding funding

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

A. Specify required skills and/or expertise: Specific skills required are stakeholder outreach and engagement, assistance to compile and report on stakeholder feedback, and integrate feedback effectively in reports and CQI (Continuous Quality Improvement) processes, as required by Cal-OAR.



- B. Which, if any, civil service class(es) normally perform(s) this work? 1820, Junior Administrative Analyst; 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2913, Program Specialist; 2915, Program Specialist Supervisor; 2917, Program Support Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Civil services classes are not feasible because this is a short term project. The office will have to recruit, hire and train temporary staff in a short period of time; and then these workers will be released from employment after the project.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be practical given the short-term nature of the project.

**6. Additional Information**

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

**7. Union Notification: On 08/30/22, the Department notified the following employee organizations of this PSC/RFP request:**

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

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

Name: johanna\_gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Mission Street, Suite 300, San Francisco, CA

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46770 - 19/20

DHR Analysis/Recommendation:  
Commission Approval Required

Civil Service Commission Action:

DHR Approved for 11/21/2022

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

## Gendelman, Johanna (HSA)

---

**From:** dhr-psccordinator@sfgov.org on behalf of johanna.gendelman@sfgov.org  
**Sent:** Tuesday, August 30, 2022 9:43 AM  
**To:** Gendelman, Johanna (HSA); Jason Klumb; Frigault, Noah (HRC); Meyers, Julie (HSA); Thomas Vitale; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); pcamarillo\_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); david.canham@seiu1021.org; jtanner940@aol.com; Laxamana, Junko (DBI); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Modification Request to PSC # 46770 - 19/20 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The HUMAN SERVICES -- DSS has submitted a modification request for a Personal Services Contract (PSC) for \$150,000 for services for the period August 30, 2022

– June 30, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrDrupal/node/17804>

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 junko.laxamana@sfgov.org 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@sfgov.org Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org jason.klumb@seiu1021.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request:  Initial  Modification of an existing PSC (PSC # 46770 - 19/20)

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

Type of Service: Consultation, Technical Assistance, Meeting Facilitation

Funding Source: Federal

PSC Original Approved Amount: \$198,000 PSC Original Approved Duration: 01/01/21 - 09/30/22 (1 year 38 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 01/12/22-06/30/24 (1 year 39 weeks)

PSC Cumulative Amount Proposed: \$198,000 PSC Cumulative Duration Proposed: 3 years 25 weeks

**1. Description of Work**

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

Assist CalWORKs to complete the components of Cal-OAR (CalWORKs Outcome and Accountability Review), a State of California mandated project. Proposed works are as follow: (1) review of the current system and, (2) development of a system improvement plan.

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

This service is necessary because Cal-OAR is a State of California mandated project. Not completing the project will cause the CalWORKs program to fall out of compliance.

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

Services have been provided in the past through earlier PSC request. See 46770 - 19/20

D. Will the contract(s) be renewed?

No, the contract will not be renewed, as this is a one-time only project.

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

N/A (This project is less than 5 years.)

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

A. Display all that apply

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

Explain the qualifying circumstances:

This is a short term project of about 3 years that requires specific skills in stakeholder outreach and engagement, assistance to compile and report on stakeholder feedback, and integrate feedback effectively in the reports and CQI processes as required by the project.

B. Reason for the request for modification:

Extending end date due to pandemic delay

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

A. Specify required skills and/or expertise: Specific skills required are stakeholder outreach and engagement, assistance to compile and report on stakeholder feedback, and integrate feedback effectively in reports and CQI (Continuous Quality Improvement) processes, as required by Cal-OAR.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1820, Junior Administrative Analyst; 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2913, Program Specialist; 2915, Program Specialist Supervisor; 2917, Program Support Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Civil services classes are not feasible because this is a short term project. The office will have to recruit, hire and train temporary staff in a short period of time; and then these workers will be released from employment after the project.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be practical given the short-term nature of the project.

**6. Additional Information**

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

**7. Union Notification: On 01/12/22, the Department notified the following employee organizations of this PSC/RFP request:**

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

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

Name: johanna\_gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Mission Street, Suite 300, San Francisco, CA

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46770 - 19/20

DHR Analysis/Recommendation:

04/18/2022

Commission Approval Required

Approved by Civil Service Commission

04/18/2022 DHR Approved for 04/18/2022



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4123 12/13)

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

Type of Service: Nutrition Education Services to Schools and Community Based Organizations

Funding Source: State Grants

PSC Original Approved Amount: \$1,220,000 PSC Original Approved Duration: 10/01/13 - 09/30/16 (3 years)

PSC Mod#1 Amount: \$406,667 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$282,033 PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$1,586,000 PSC Mod#3 Duration: 10/01/16-09/30/19 (3 years)

PSC Mod#4 Amount: \$350,000 PSC Mod#4 Duration: 10/01/19-09/30/22 (3 years 1 day)

PSC Mod#5 Amount: \$703,360 PSC Mod#5 Duration: 10/01/19-09/30/24 (2 years 1 day)

PSC Mod#6 Amount: \$2,421,692 PSC Mod#6 Duration: 10/01/19-06/30/29 (4 years 39 weeks)

PSC Cumulative Amount Proposed: \$6,969,752 PSC Cumulative Duration Proposed: 15 years 39 weeks

**1. Description of Work**

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

Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.

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

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires Local Health Departments (LHD's) acting as lead agencies to contract portions of the State approved scope of work to community partners, including schools, non-profits and faith-based organizations. The consequences of denial would be an inability to comply with the terms of the grant award, resulting in loss of funding and the inability to provide these services which provide important local, community-based initiatives to promote healthy eating and physical activity in a variety of settings to targeted populations.

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 4123 12/13

D. Will the contract(s) be renewed?

Only if funding is available.

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

The Department expects the need for these services to continue.

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

A. Display all that apply

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

Explain the qualifying circumstances:

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires lead agencies to contract out with community partners, including schools, non-profits and faith-based organizations. This contracting authority will allow compliance with the requirements of the grant.

B. Reason for the request for modification:

To extend the duration to align with the anticipated contract term stated in the RFP and increase the PSC amount accordingly.

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

- A. Specify required skills and/or expertise: The State grant funding these services requires that contractors have the ability to provide nutrition education to community partners and their clients, as well as the ability to provide technical assistance and training to community partners in order to ensure they are able to carry out the activities in the mandated scope of work.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2819, Assistant Health Educator; 2846, Nutritionist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Civil service classes will be working in support of this grant, however, under the terms of the grant, the Local Health Department (LHD) must (sub)contract up to 50% of the awarded budget to schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations. The selected contract agencies must have access to and pre-existing partnerships with populations that are not readily available to City organizations.
- 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 funding for the proposed contract is for a limited term and decreases over the term of the grant.

**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, contractor will not train City employees. Training will be provided to community partners and clients.
- 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.  
See attached file:4123-1213 Nutrition Project WIC SNAP.p

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.  
18 Reasons, Children's Coun, SF Public Hlth Fdn, SFUnifiedSchoolD

7. **Union Notification:** On 10/13/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 101 Grovet St. rm. 307, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4123 12/13

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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

## Receipt of Modification Request to PSC # 4123 12/13 - MODIFICATIONS

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

on behalf of

kelly.hiramoto@sfdph.org <kelly.hiramoto@sfdph.org>

Thu 10/13/2022 6:02 PM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; pkim@ifpte21.org <pkim@ifpte21.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; brenda\_mendieta@sfdph.org <brenda\_mendieta@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccoordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$2,421,692 for services for the period October 1, 2019 – June 30, 2029. 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/3808>

Email sent to the following addresses: L21PSCReview@ifpte21.org

pkim@ifpte21.org

kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com

WendyWong26@yahoo.com junko.laxamana@sfgov.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4123 12/13)

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

Type of Service: Nutrition Education Services to Schools and Community Based Organizations

Funding Source: State Grants

PSC Original Approved Amount: \$1,220,000 PSC Original Approved Duration: 10/01/13 - 09/30/16 (3 years)

PSC Mod#1 Amount: \$406,667 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$282,033 PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$1,586,000 PSC Mod#3 Duration: 10/01/16-09/30/19 (3 years)

PSC Mod#4 Amount: \$350,000 PSC Mod#4 Duration: 10/01/19-09/30/22 (3 years 1 day)

PSC Mod#5 Amount: \$703,360 PSC Mod#5 Duration: 10/01/19-09/30/24 (2 years 1 day)

PSC Cumulative Amount Proposed: \$4,548,060 PSC Cumulative Duration Proposed: 11 years 2 days

**1. Description of Work**

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

Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.

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

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires Local Health Departments (LHD's) acting as lead agencies to contract portions of the State approved scope of work to community partners, including schools, non-profits and faith-based organizations. The consequences of denial would be an inability to comply with the terms of the grant award, resulting in loss of funding and the inability to provide these services which provide important local, community-based initiatives to promote healthy eating and physical activity in a variety of settings to targeted populations.

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 4123 12/13

D. Will the contract(s) be renewed?

Only if funding is available.

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

The Department expects the need for these services to continue.

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

A. Display all that apply

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

Explain the qualifying circumstances:

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires lead agencies to contract out with community partners, including schools, non-profits and faith-based organizations. This contracting authority will allow compliance with the requirements of the grant.

B. Reason for the request for modification:

Received additional grant award for the new contract period

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

A. Specify required skills and/or expertise: The State grant funding these services requires that contractors have the ability to provide nutrition education to community partners and their clients, as well as the ability to provide technical assistance and training to community partners in order to ensure they are able to carry out the activities in the mandated scope of work.

B. Which, if any, civil service class(es) normally perform(s) this work? 2819, Assistant Health Educator; 2846, Nutritionist;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Civil service classes will be working in support of this grant, however, under the terms of the grant, the Local Health Department (LHD) must (sub)contract up to 50% of the awarded budget to schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations. The selected contract agencies must have access to and pre-existing partnerships with populations that are not readily available to City organizations.

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 funding for the proposed contract is for a limited term and decreases over the term of the grant.

**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.  
See attached file:4123-1213 Nutrition Project WIC SNAP.p

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.  
18 Reasons, Children's Coun, SF Public Hlth Fdn, SFUnifiedSchoolD

7. **Union Notification:** On 07/15/22, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 101 Grovet St. rm. 307, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4123 12/13

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 07/28/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4123 12/13)

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

Type of Service: Nutrition Education Services to Schools and Community Based Organizations

Funding Source: State Grants

PSC Original Approved Amount: \$1,220,000

PSC Original Approved Duration: 10/01/13 - 09/30/16 (3 years)

PSC Mod#1 Amount: \$406,667

PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$282,033

PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$1,586,000

PSC Mod#3 Duration: 10/01/16-09/30/19 (3 years)

PSC Mod#4 Amount: \$350,000

PSC Mod#4 Duration: 10/01/19-09/30/22 (3 years 1 day)

PSC Cumulative Amount Proposed: \$3,844,700

PSC Cumulative Duration Proposed: 9 years 1 day

**1. Description of Work**

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

Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.

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

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires Local Health Departments (LHD's) acting as lead agencies to contract portions of the State approved scope of work to community partners, including schools, non-profits and faith-based organizations. The consequences of denial would be an inability to comply with the terms of the grant award, resulting in loss of funding and the inability to provide these services which provide important local, community-based initiatives to promote healthy eating and physical activity in a variety of settings to targeted populations.

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?

Only if funding is available.

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:  
The Department expects the need for these services to continue.

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

A. Display all that apply

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

Explain the qualifying circumstances:

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires lead agencies to contract out with community partners, including schools, non-profits and faith-based organizations. This contracting authority will allow compliance with the requirements of the grant.

B. Reason for the request for modification:

Services to continue under new solicitation.

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

- A. Specify required skills and/or expertise: The State grant funding these services requires that contractors have the ability to provide nutrition education to community partners and their clients, as well as the ability to provide technical assistance and training to community partners in order to ensure they are able to carry out the activities in the mandated scope of work.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2819, Assistant Health Educator; 2846, Nutritionist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Civil service classes will be working in support of this grant, however, under the terms of the grant, the Local Health Department (LHD) must (sub)contract up to 50% of the awarded budget to schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations. The selected contract agencies must have access to and pre-existing partnerships with populations that are not readily available to City organizations.
- 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 funding for the proposed contract is for a limited term and decreases over the term of the grant.

**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, contractor will not train City employees. Training will be provided to community partners and clients.
- 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.  
18 Reasons, Children's Coun, SF Public Hlth Fdn, SFUnifiedSchoolD

**7. Union Notification:** On 05/10/19, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

Name: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: 101 Grovet St. rm. 307, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4123 12/13

DHR Analysis/Recommendation:

06/17/2019

Commission Approval Required

Approved by Civil Service Commission

06/17/2019 DHR Approved for 06/17/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 45965 - 19/20)

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

Type of Service: Crane and Hoist Services(11323)

Funding Source: Wastewater Enterprise Operating Budget

PSC Original Approved Amount: \$.375,000 PSC Original Approved Duration: 10/01/19 - 09/30/22 (3 years)

PSC Mod#1 Amount: \$.375,000 PSC Mod#1 Duration: 09/30/22-01/31/26 (3 years 17 weeks)

PSC Cumulative Amount Proposed: \$.750,000 PSC Cumulative Duration Proposed: 6 years 17 weeks

**1. Description of Work**

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

Crane inspections and repair in accordance with CalOSHA ANSI standards in compliance with Plate V title 8 Federal code including OSHA 1810.179, ASME, and ANSI.

Scope of services will include, but is not limited to the following main services on equipment located within SFPUC-WWE system wide:

- Quarterly Maintenance and Inspections
- Mandatory Partial Load Testing,
- Proof Load and Operational Testing,
- Mandatory Annual Inspection, Maintenance, Certification
- Quadrennial Inspection, Maintenance, Certification,
- Troubleshooting and
- "As-needed Repairs"

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

Mandatory CalOSHA title 8 compliance. There's no argument that preventive maintenance—conducted in accordance with the manufacturer's recommendations—is essential to promoting overhead crane safety. This is a standard and furthers the case for preventive maintenance by outlining safe, proper preventive maintenance procedures that minimize interference with operation of cranes that are still in use. Through regular crane equipment inspections, technicians can discover worn parts and other problems, and schedule a crane repair when it is least disruptive to the company's operations. This saves the department from having to shut down during a peak production period due to unforeseen equipment 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.

Services have been provided in the past through earlier PSC request. See 45965 - 19/20

D. Will the contract(s) be renewed?

Yes

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

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

A. Display all that apply

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

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

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

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

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

Explain the qualifying circumstances:

The work waste water does is permitted by the state of California governed by the National Pollutant Discharge Elimination System, there is critical equipment, cranes being one, that require specialized periodic mandatory inspection and maintenance to help maintain and comply with the permit as we are responsible.

B. Reason for the request for modification:

We still needed the service, and have confirmed we can extend the contract.

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

A. Specify required skills and/or expertise: This service requires the contractor to be properly licensed and earn a DOSH number from the State of California with a Dual C-61 Limited Specialty, D21 Machinery and Pumps licenses Contractors License.

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.

There is no civil service class that could perform the work, city employees do not possess the CSLB certifications required to legally work on these units.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Not practical at this time because we do not

have very many of these types of assets. We only need to perform preventive and corrective maintenance from time to time; it's much more economically feasible to contract this work out.

**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.  
We will not be training employees. We do not have the expertise nor resources to dedicate to the infrequent need to handle this equipment.
  
- C. Are there legal mandates requiring the use of contractual services?  
No.
  
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
  
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
  
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 10/14/22, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45965 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

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



**From:** dhr-psccordinator@sfgov.org on behalf of shale@sfwater.org  
**To:** Hale, Shawndrea M.; najuwanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@bt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Kathy; Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; iduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; dhr-psccordinator@sfgov.org  
**Subject:** Receipt of Modification Request to PSC # 45965 - 19/20 - MODIFICATIONS  
**Date:** Friday, October 14, 2022 12:03:38 PM

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PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$375,000 for services for the period September 30, 2022 – January 31, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/19308>

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present. Either you selected none or there is no email entered in the system by that particular union

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: 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: Crane and Hoist Services(11323)

Funding Source: Wastewater Enterprise Operating Budget

PSC Duration: 3 years

PSC Amount: \$375,000

**1. Description of Work**

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

Crane inspections and repair in accordance with CalOSHA ANSI standards in compliance with Plate V title 8 Federal code including OSHA 1810.179, ASME, and ANSI.

Scope of services will include, but is not limited to the following main services on equipment located within SFPUC-WWE system wide:

- Quarterly Maintenance and Inspections
- Mandatory Partial Load Testing,
- Proof Load and Operational Testing,
- Mandatory Annual Inspection, Maintenance, Certification
- Quadrennial Inspection, Maintenance, Certification,
- Troubleshooting and
- "As-needed Repairs"

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

Mandatory CalOSHA title 8 compliance. There's no argument that preventive maintenance—conducted in accordance with the manufacturer's recommendations—is essential to promoting overhead crane safety. This is a standard and furthers the case for preventive maintenance by outlining safe, proper preventive maintenance procedures that minimize interference with operation of cranes that are still in use. Through regular crane equipment inspections, technicians can discover worn parts and other problems, and schedule a crane repair when it is least disruptive to the company's operations. This saves the department from having to shut down during a peak production period due to unforeseen equipment 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, this service has always been provided through an OCA generated contract (ITSF1600091CD). The PUC Wastewater enterprise has had several Crane and Gantry service contracts to allow for adherence to California OSHA state procedures.

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):

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

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

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

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

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

B. Explain the qualifying circumstances:

The work waste water does is permitted by the state of California governed by the National Pollutant Discharge Elimination System, there is critical equipment, cranes being one, that require specialized periodic mandatory inspection and maintenance to help maintain and comply with the permit as we are responsible.

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

A. Specify required skills and/or expertise: This service requires the contractor to be properly licensed and earn a DOSH number from the State of California with a Dual C-61 Limited Specialty, D21 Machinery and Pumps licenses Contractors License.

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

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

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

None

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

A. Explain why civil service classes are not applicable.

There is no civil service class that could perform the work, city employees do not possess the CSLB certifications required to legally work on these units.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Not practical at this time because we do not have very many of these types of assets. We only need to perform preventive and corrective maintenance from time to time; it's much more economically feasible to contract this work out.

**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. We will not be training employees. We do not have the expertise nor resources to dedicate to the infrequent need to handle this equipment.

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 07/26/2019, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

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

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

Address: 525 Golden Gate Avenue San Francisco, CA 94102

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PSC# 45965 - 19/20

DHR Analysis/Recommendation:

Commission Approval Required

09/16/2019 DHR Approved for 09/16/2019

action date: 09/16/2019

Approved by Civil Service Commission