



London Breed
Mayor

Carol Isen
Human Resources Director

Date: January 20, 2023
To: The Honorable Civil Service Commission
Through: Carol Isen
Human Resources Director
From: Kelly Hiramoto, DPH
Shawndrea Hale / Daniel Kwon, PUC
Wilson Ng, BOS
Amanda Wentworth, TTX
Subject: **Personal Services Contracts Approval Request**

This report contains ten (10) 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
\$5,600,000	\$174,312,805	\$1,355,002,161

Kelly Hiramoto
Public Health
1380 Howard St.,
San Francisco, CA 94103
(415) 206-4168

Shawndrea Hale / Daniel Kwon
Public Utilities Commission
525 Golden Gate Ave., 8th Floor
San Francisco, CA 94102
SH: (415) 551-4540
DK: (415) 934-5722

Wilson Ng
Board of Supervisors
1 Dr. Carlton B Goodlett Pl. Rm 244
San Francisco, CA 94102
(415) 554-7725

Amanda Wentworth
Treasurer / Tax Collector
1 Dr. Carlton B Goodlett Pl. Rm 244
San Francisco, CA 94102
(415) 554-4871

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POSTING FOR

February 06, 2023

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
<u>43391 - 22/23</u>	PUBLIC HEALTH	\$1,100,000.00	Human tissue preservation services related to the collection, shipment, storage, and return of autologous human bone and skull flaps which are processed and distributed for re-implantation in patients, and to procure human allograft tissue from contractor.	January 1, 2023	December 31, 2027	REGULAR
<u>45022 - 22/23</u>	PUBLIC HEALTH	\$500,000.00	<p>The selected contractor will provide monthly water treatment service visits and also includes inspection, minor adjustments, chemical treatment guidance and maintenance work plan for City personnel to conduct routine maintenance in between vendor visits, written water treatment analysis reports and recommendations for replacement or repair of minor items such as controllers or valves. Vendor to provide training and guidance to City employees as to proper and safe handling, usage and storage of chemicals to be procured through this Agreement.</p> <p>In addition the contractor shall provide as-needed guidance to the the Department to properly use the proprietary chemical solutions procured under contract to treat the power plant's water for the cooling towers, boilers, chillers and closed loop systems at Zuckerberg San Francisco General Hospital.</p>	March 1, 2023	December 31, 2028	REGULAR
<u>43908 - 22/23</u>	PUBLIC UTILITIES COMMISSION	\$500,000.00	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.	February 1, 2023	January 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>Scope of services will include, but is not limited to the following main services on equipment located within SFPUC-Water system wide:</p> <ul style="list-style-type: none"> • 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” 			
<u>47164 - 22/23</u>	PUBLIC UTILITIES COMMISSION	\$2,000,000.00	Contractor shall develop and implement a comprehensive federal lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters and other materials; and representing the SFPUC before the United States Congress, Federal Administration, regulatory agencies, industry associations and other entities as needed.	March 1, 2023	March 1, 2028	REGULAR
TOTAL AMOUNT \$4,100,000						

Posting For February 06, 2023

Proposed Modifications to Personal Services Contracts

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
47220 - 16/17 - MODIFICATIONS	February 6, 2023	BOARD OF SUPERVISORS -- BOS	\$0	\$540,000	<p>The Office of the Clerk of the Board's (COB) seeks a vendor to enhance or replace an aging and costly LMS with a solution to effectively address mandated requirements, streamline legislative workflow, and meet stakeholder expectations. The COB will adopt a legislative system that will streamline the process of 1) drafting, submitting, and accessing status of legislation, 2) developing and managing public meeting agenda, and 3) ensuring the integrity and retention of legislative records. The LMS would not only support the core business of the Board of Supervisors, but all City Departments and agencies that submit and recommend legislation and/or amendments. The</p>	12/23/2022	12/31/2025	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
43379 - 19/20 - MODIFICATIONS	February 6, 2023	PUBLIC HEALTH - - DPH	\$1,500,000	\$3,000,000	<p>technology solution will be developed, implemented, and supported through a software development and support agreement with the Contractor and internal COB IT staff.</p> <p>The contractor will provide a unique cardiac rhythm monitoring device in the form of small adhesive wireless device worn on a patient's chest in an adhesive patch, as well as related data analysis. The patch-monitors provide continuous electrocardiogram (ECG) monitoring, typically for up to 14 days. They replace the traditional cardiac rhythm monitoring device, a small camera-sized device worn by patients around the neck on a cord and connected to silver dollar-sized electrodes attached to the chest. Utilization of these patch-monitors enables either the health care provider or the patient</p>	05/01/2023	12/31/2030	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
44711 - 20/21 - MODIFICATIONS	February 6, 2023	PUBLIC UTILITIES COMMISSION -- PUC	\$0	\$450,000	<p>themselves to place the patch-monitor on the patient's chest. After the monitoring period, the contractor analyzes and uploads the results to a secure website, where the the health care provider--the Department of Public Health staff--may view them. The amount of this PSC includes an anticipated expansion of this service, as the Department must increasingly utilize telemedicine services in order to provide appropriate patient care due to the need to shelter-in-place in response to COVID-19.</p> <p>The purpose of this agreement is to allow SFPUC to join The Bay Area Regional Heat Pump Water Heater Contractor Incentive Program, which is a cooperative program implemented by public agencies across the Bay Area that provides workforce development through contractor</p>	01/06/2023	07/01/2026	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					<p>training and incentives for installation of energy-efficient heat pump water heaters (HPWH). The program is administered by The Energy Council, a Joint Powers Agency based in Alameda County. The program is currently available in the counties of Alameda, Contra Costa, Marin, Napa, and Solano and the cities of Santa Clara and Tracy. The Energy Council is implementing the program in conjunction with Energy Solutions, a consultant they have contracted with directly. The scope of work with Energy Solutions includes the following: administrative services, including handling incentive applications and processing; program management services, including invoicing and reporting, contractor training and engagement, including developing training content, delivering training to</p>			

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
45469 - 19/20 - MODIFICATIONS	February 6, 2023	PUBLIC UTILITIES COMMISSION -- PUC	\$0	\$9,500,000	<p>contractors, and encouraging contractors to register in the program's web portal. The Energy Council will be responsible for convening meetings with participating agencies to discuss the program, provide updates, and solicit feedback. The Energy Council will inform participating agencies of new policies and programs in the region or state that impact HPWH sales and will provide trainings on codes for HPWHs to building department staff. Lastly, the Energy Council will hold all funds contributed by participating agencies in an account insured by the Federal Deposit Insurance Corporation.</p> <p>The scope of work is to augment, assist, and support Program Control Group (PCG) staff in the administration, improvement and programming of PCG's Primavera-based</p>	12/30/2022	12/31/2028	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
36741 - 19/20 - MODIFICATIONS	February 6, 2023	TREASURER/TAX COLLECTOR -- TTX	\$0	\$1,200,000	<p>Program Control, Capital Planning and Construction Management Systems to integrate it with various other databases to generate reports and update capital program and project data (This is not to provide scheduling and cost estimating services).</p> <p>The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach and meet the unique financial needs of at-risk transitional age youth (TAY), aged 16-24, including TAY experiencing homelessness. Smart Money Coaching will support TAY to build towards financial security through a number of strategies, including repairing and building their credit, accessing</p>	12/20/2022	06/30/2025	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
44431 - 22/23 - MODIFICATIONS	February 6, 2023	PUBLIC UTILITIES COMMISSION -- PUC	\$0	\$300,000	<p>bank accounts with no hidden fees or overdraft, utilizing direct deposit and bill payment to manage their funds, and accessing safe, affordable credit.</p> <p>The San Francisco Public Utilities Commission (SFPUC) is launching a Pilot Residential Green Infrastructure Grant Program and seeks to retain the services of a qualified Program Administrator to assist the SFPUC with the implementation of the Program. This new pilot Program will test new technologies on residential properties, encourage residential property owners to manage stormwater on-site, improve sewer collection system performance during wet weather, and educate San Franciscans on the collection system and stormwater management. This professional services contract will be used to fund a short-term,</p>	01/20/2023	03/15/2025	REGULAR

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					<p>pilot-scale program to test a new grant administration structure and deliver a limited number of projects. The lessons learned from the results of this contract will contribute to future budgeting and staffing for the Residential Green Infrastructure Grant Program. The Program Administrator will be responsible for program administration, financial management, property owner outreach and coordination, project management, and reporting for the installation of green stormwater infrastructure facilities on residential properties in San Francisco. The Program Administrator will conduct outreach to interested homeowners and recruit them to participate in the Program through workshops, outreach collateral, and site visits. The Program Administrator will assess</p>			

PSC Number	<u>Commission Hearing Date</u>	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					residential properties and support homeowners in developing applications for grant funding. The Program Administrator will issue payments to homeowners for the cost of design and construction services to build green stormwater infrastructure projects on their properties. The Program Administrator will also provide customer service, collect and manage data, and submit monthly reports on Program performance to the SFPUC.			
			TOTAL AMOUNT \$1,500,000					

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Human Tissue Preservation Services

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$1,100,000

1. Description of Work

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

Human tissue preservation services related to the collection, shipment, storage, and return of autologous human bone and skull flaps which are processed and distributed for re-implantation in patients, and to procure human allograft tissue from contractor.

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

This service is necessary because it is related to medical treatment of trauma and surgical patients. The Department of Public Health (DPH) uses California Transplant's Autologous Tissue Storage System for skull flaps recovered from trauma and surgical patients. A portion of skull is removed and stored for re-implant at a later date. California Transplant provides the storage kits for the skull flaps and stores them until required.

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.

DPH has previously used Prop Q for purchasing with California Transplant while the Office of Contract Administration was negotiating a contract for long-term use.

D. Will the contract(s) be renewed?

Yes

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

The Department expects the need for these services to be ongoing.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

Contractor will provide human tissue preservation kits for the collection, shipment and return of autologous human bone and skull flaps, along with storage.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Preservation, collection, shipment and storage services of human tissue.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2402, Laboratory Technician I; 2416, Laboratory Technician II;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide human tissue preservation kits for the collection, shipment and return of autologous human bone and skull flaps, along with storage.

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

None. California Transplant is a clinically preferred contractor and in the best interest of patients, DPH has procured these services from contractor in the past.

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

- A. Explain why civil service classes are not applicable.
California Transplant is a clinically preferred contractor and provides storage preservation kits and storage for the collection, shipment, and return of autologous human bone and skull flaps.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the services related to the preservation kits is incidental to the actual procurement. DPH is primarily procuring human tissue preservation kits and storage. Services related to the kits and storage are incidental and de minimis in nature and more related to shipping, inspection, and storage. Furthermore, any services provided by the contractor is done at contractor's facilities, as DPH will handle procurement, packaging, and shipping the kits to contractor on the front end.

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. Services are incidental to contract. The main crux of the agreement is provision of human tissue preservation kits. DPH shall assure that its surgical staff reads, becomes familiar with, and will follow the instructions as stated in California Transplant Services' (CTS) Forms 40-2000-1 (Autograft Preservation Service Request Form) and 40-200-3 (Instructions for Storage of Skull Flaps) in their most recent revision included as part of the autologous tissue recovery kit and shipper provided to Department by CTS. The instructions may be modified from time to time to comply with American Association of Tissue Banks standards, regulatory requirements, or to improve clarity of the instructions and the process of tissue recovery and packaging.
- C. Are there legal mandates requiring the use of contractual services?
No.

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

7. Union Notification: On 11/04/2022, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 1380 Howard St, Room 419B San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43391 - 22/23

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 02/06/2023

Civil Service Commission Action:

Receipt of Union Notification(s)

Receipt of Notice for new PCS over \$100K PSC # 43391 - 22/23

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

on behalf of

kelly.hiramoto@sfdph.org <kelly.hiramoto@sfdph.org>

Fri 11/4/2022 9:50 AM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;Najuawanda Daniels <najuawanda.daniels@seiu1021.org>;Jason Klumb <Jason.Klumb@seiu1021.org>;Frigault, Noah (HRC) <noah.frigault@sfgov.org>;Julie.Meyers@sfgov.org <Julie.Meyers@sfgov.org>;Thomas Vitale <thomas.vitale@seiu1021.org>;Ricardo.lopez@sfgov.org <Ricardo.lopez@sfgov.org>;Kbasconillo@sfgwater.org <Kbasconillo@sfgwater.org>;pcamarillo_seiu@sbcglobal.net <pcamarillo_seiu@sbcglobal.net>;Wendy Frigillana <wendy.frigillana@seiu1021.org>;pscreview@seiu1021.org <pscreview@seiu1021.org>;ted.zarzecki@seiu1021.net <ted.zarzecki@seiu1021.net>;davidmkersten@gmail.com <davidmkersten@gmail.com>;xiumin.li@seiu1021.org <xiumin.li@seiu1021.org>;Sin.Yee.Poon@sfgov.org <Sin.Yee.Poon@sfgov.org>;david.canham@seiu1021.org <david.canham@seiu1021.org>;jtanner940@aol.com <jtanner940@aol.com>;Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

RECEIPT for Union Notification for PSC 43391 - 22/23 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 43391 - 22/23 for \$1,100,000 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/19398> For union notification, please see

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

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

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Maintenance and Support Services for Cooling Towers, Boilers & Closed Loop Treatment

Funding Source: General Funds and Hospital Funds

PSC Duration: 5 years 43 weeks

PSC Amount: \$.500,000

1. Description of Work

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

The selected contractor will provide monthly water treatment service visits and also includes inspection, minor adjustments, chemical treatment guidance and maintenance work plan for City personnel to conduct routine maintenance in between vendor visits, written water treatment analysis reports and recommendations for replacement or repair of minor items such as controllers or valves. Vendor to provide training and guidance to City employees as to proper and safe handling, usage and storage of chemicals to be procured through this Agreement.

In addition the contractor shall provide as-needed guidance to the the Department to properly use the proprietary chemical solutions procured under contract to treat the power plant's water for the cooling towers, boilers, chillers and closed loop systems at Zuckerberg San Francisco General Hospital.

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

The services are necessary in order to maintain the proper operation of the closed loop system at Zuckerberg San Francisco General Hospital. Denial of this request will result in the Hospital being at risk of not being able to operate key components of a required facility 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.

Services have been provided under the PO process. For the upcoming contract the Office of Contract Administration has conducted a solicitation and will move forward with a term contract for future services.

D. Will the contract(s) be renewed?

Yes.

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.
the requested approval is in excess of five years because the Department will have a continued need to maintain and monitor the Cooling Towers, Boilers & Closed Loop Treatment system at Zuckerberg San Francisco General Hospital. The services are unique and typically performed by highly specialized staff and are needed for the ongoing operation of the the closed loop treatment system at Zuckerberg San Francisco General Hospital.

2. Reason(s) for the Request

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

- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

Services required on an as-needed, intermittent, or periodic basis: although the service are performed on a regular schedule the volume of the services low and are performed on a scheduled periodic basis. Services that require resources that the City lacks: The contractor will provide specialized technicians and custom mixed chemicals for the the closed loop system

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The selected contractor will provide expertise on how to reduce contaminants, and how to utilize treatment solutions to minimize fouling or deposit build up in the system. Typical vendors would need at least ten years of continuous experience in the realm of water treatment for industrial heating and cooling systems. The resources provided by the contractor will be highly trained specialist in the area of water chemistry, and proper operation of various closed loops systems.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2481, Water Quality Technician; 2482, Water Quality Tech III;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide provide specialized technicians and the required specialized chemicals at a custom mixed level to maintain the optimum working specifications of the closed loop system.

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

The services are highly specialized and require the use of specialized technicians in the area of water based systems and closed loop systems. City Employees perform the day to day maintenance of the closed loop system.

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

- A. Explain why civil service classes are not applicable.
Civil services classes are not applicable because the services are highly specialized and require the use of specialized technicians in the area of water based systems and closed loop systems. City Employees perform the day to day maintenance of the closed loop system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No the services, although performed on a regular schedule, are low in volume and highly specialized.

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 Contract does not contemplate a formal training program for City staff. However, City staff will gain knowledge through interactions and through reports, and findings provided 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 12/07/2022, 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: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 1380 Howard St. San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45022 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

Receipt of Notice for new PCS over \$100K PSC # 45022 - 22/23

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

on behalf of

kelly.hiramoto@sfdph.org <kelly.hiramoto@sfdph.org>

Wed 12/7/2022 10:47 PM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>;amakayan@ifpte21.org <amakayan@ifpte21.org>;ecassidy@ifpte21.com <ecassidy@ifpte21.com>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;tmathews@ifpte21.org <tmathews@ifpte21.org>;kschumacher@ifpte21.org <kschumacher@ifpte21.org>;kpage@ifpte21.org <kpage@ifpte21.org>;eerbach@ifpte21.org <eerbach@ifpte21.org>;l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>;Longhitano, Robert (DPH) <robert.longhitano@sfdph.org>;DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

RECEIPT for Union Notification for PSC 45022 - 22/23 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 45022 - 22/23 for \$500,000 for Initial Request services for the period 03/01/2023 – 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/dhrdrupal/node/19533> 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: Crane and Hoist Services

Funding Source: Water Operating Funds

PSC Duration: 3 years

PSC Amount: \$500,000

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-Water 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 been provided to Wastewater Enterprise through an OCA generated contract. The most recent approved PSC was #45965. Water Enterprise did not participate in this contracting effort and seeks now to piggyback on Wastewater's most recent solicitation in order to receive the same scope of services.

D. Will the contract(s) be renewed?
No

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

Cranes are critical equipment that require specialized, periodic mandatory inspection and maintenance to help maintain safety and to comply with CalOSHA title 8.

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

A. Specify required skills and/or expertise: This PSC request is for three years. No extension in the duration of the contract will be requested. Future procurement efforts will entail combining Water and Wastewater Enterprise maintenance needs into a single PSC for a single contract.

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

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

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

N/A

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

A. Explain why civil service classes are not applicable.

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 Contractors Licenses. 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. This is not cost prohibitive as the work is too short term and intermittent to require a full FTE.

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. City employees are not legally certified with required CSLB licenses

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

No.

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

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

No.

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

No.

7. Union Notification: On 12/29/2022, 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# 43908 - 22/23

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 02/06/2023

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhrr-psccoordinator@sfgov.org on behalf of shale@sfgwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); seichenberger@local39.org; dtuttle@oe3.org; dtubble@oe3org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pkimg@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@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@ibt856.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; [Basconillo, Kathy](mailto:Basconillo,Kathy); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhrr-psccoordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 43908 - 22/23
Date: Thursday, December 29, 2022 4:21:44 PM

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

RECEIPT for Union Notification for PSC 43908 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 43908 - 22/23 for \$500,000 for Initial Request services for the period 02/01/2023 – 01/31/2026. 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/dhrrupal/node/19586> 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 # 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 contact? 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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45965 - 19/20

DHR Analysis/Recommendation:

11/21/2022

Commission Approval Required

Approved by Civil Service Commission

11/21/2022 DHR Approved for 11/21/2022

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: Federal Legislative Representation and Advocacy Services

Funding Source: SFPUC External Affairs Operating Budget

PSC Duration: 5 years 2 days

PSC Amount: \$2,000,000

1. Description of Work

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

Contractor shall develop and implement a comprehensive federal lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters and other materials; and representing the SFPUC before the United States Congress, Federal Administration, regulatory agencies, industry associations and other entities as needed.

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

A lobbyist is best positioned to perform legislative representation and advocacy services before the U.S. Congress and Federal Administration in areas of interest to SFPUC. Without these services, the SFPUC is at risk of costly operational impacts to its water, wastewater and power enterprises resulting from legislative and administrative actions. SFPUC is also at risk of losing out on critical funding opportunities to support its operations and infrastructure.

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

SFPUC has contracted for these services in the past, most recently through PRO.0061. 46714-1617_PUC_8202019

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.

This PSC is five years exactly, to allow for continuity in the SFPUC's representation at the federal level

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 service is required intermittently; most lobbyists represent multiple clients and thus the position could not be fulfilled by a fulltime City employee. Additionally, the City does not currently have this capacity, nor do we have employees or resources based in Washington, DC.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Eight (8) years of lobbyist experience specializing in the areas of water, wastewater, energy, infrastructure, ratepayer assistance funding, workforce, environmental justice, and/or racial equity; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the U.S. Congress, the Federal Administration and appropriate government agencies.

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, the SFPUC will not own or possess the office in DC used by this contractor.

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

The level of legislative representation needed in Washington, DC for this work do not currently exist within the City. These services would require dedicated staff to be based in the federal capitol in order to attend meetings with federal public officials and administrators, and testify at hearings on behalf of the Department.

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

A. Explain why civil service classes are not applicable.

Civil Service classes may be relevant to portions of the work, but there is no one particular class or group of classes that encompasses the specific qualifications and expertise required for these services, and the work must be performed in Washington, DC on a daily basis.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Adopting a new civil service class would not address the advantages of hiring a specialist who has the resources and level of contact with Congressional and Administrative staff required to effectively advocate on behalf of the Department. These services are best performed by a lobbyist located in Washington, DC. Building internal capacity for a permanent lobbying presence based in Washington, DC would not be practical, cost-effective or in the best interest of the SFPUC at this time.

6. Additional Information

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

No.

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

7. Union Notification: On 12/29/2022, 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# 47164 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfwater.org
To: [dhr-psccordinator@sfgov.org](mailto:Hale, Shawndrea M.; dtuttle@oe3.org; dtubble@oe3org; pkim@ifpte21.org; najuwanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snarano@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; janko.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@ibt856.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; Basconillo, 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; Hale, Shawndrea M.; <a href=)
Subject: Receipt of Notice for new PCS over \$100K PSC # 47164 - 22/23
Date: Thursday, December 29, 2022 2:19:47 PM

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RECEIPT for Union Notification for PSC 47164 - 22/23 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 47164 - 22/23 for \$2,000,000 for Initial Request services for the period 03/01/2023 – 03/01/2028. 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/19642> 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 # 46714 - 16/17)

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

Type of Service: Federal Legislative Representation and Advocacy Services (CS-1066)

Funding Source: SFPUC External Affairs Budget

PSC Original Approved Amount: \$1,200,000 PSC Original Approved Duration: 07/01/17 - 06/29/22 (4 years 52 weeks)

PSC Mod#1 Amount: \$20,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$1,220,000 PSC Cumulative Duration Proposed: 4 years 52 weeks

1. Description of Work

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

The proposed work includes developing and implementing a comprehensive federal lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure, and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters, and other materials; and representing the SFPUC before the United States Congress, Federal Administration, regulatory agencies, industry associations and other entities as needed. This work will be performed in our nation's capitol, Washington DC, on a daily basis.

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

A lobbyist is best positioned to perform legislative representation and advocacy services before the U.S. Congress in areas of interest to SFPUC. Without these services, the SFPUC is at risk of costly operational impacts to its water, wastewater and power enterprises resulting from legislative and administrative actions. SFPUC is also at risk of losing out on critical funding opportunities to support its operations and infrastructure.

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

Services have been provided in the past through earlier PSC request. See 46714 - 16/17

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Expertise and knowledge of lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the U.S. Congress, the Federal Administration and appropriate government agencies.

B. Reason for the request for modification:

Increase in the not-to-exceed amount by \$20,000, with no change in the agreement duration, to provide travel reimbursements in the amount of \$5,000 per year for the final four years of the contract.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The required skills includes strong lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the U.S. Congress, the Federal Administration, and appropriate government agencies.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 0923, Manager II; 0933, Manager V;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, an office in Washington, DC.

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 may be relevant to portions of the work, but there is no one particular class or group of classes that encompasses the specific qualifications and expertise required for these services, and the work must be performed in Washington, DC on a daily basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, adopting a new civil service class would not address the advantages of hiring a specialist who has the resources and level of contact with congressional and administrative staff required to effectively advocate on behalf of the Department.

6. Additional Information

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

7. Union Notification: On 08/01/19, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Management & Superv Local 21; Architect & Engineers, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46714 - 16/17

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 08/20/2019

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: Federal Legislative Representation and Advocacy Services (CS-1066)

Funding Source: SFPUC External Affairs Budget

PSC Duration: 4 years 52 weeks

PSC Amount: \$1,200,000

1. Description of Work

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

The proposed work includes developing and implementing a comprehensive federal lobbying strategy for the San Francisco Public Utilities Commission (SFPUC) on legislative and regulatory issues related to water, wastewater, power, infrastructure, and other issues as directed. Scope includes identifying and advocating for or against legislative and regulatory items of interest; drafting legislative language, comment letters, and other materials; and representing the SFPUC before the United States Congress, Federal Administration, regulatory agencies, industry associations and other entities as needed. This work will be performed in our nation's capitol, Washington DC, on a daily basis.

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

A lobbyist is best positioned to perform legislative representation and advocacy services before the U.S. Congress in areas of interest to SFPUC. Without these services, the SFPUC is at risk of costly operational impacts to its water, wastewater and power enterprises resulting from legislative and administrative actions. SFPUC is also at risk of losing out on critical funding opportunities to support its operations and infrastructure.

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

SFPUC has contracted for these services in the past, through PSC #4073-06/07 (CS-232R).

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:

Expertise and knowledge of lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the U.S. Congress, the Federal Administration and appropriate government agencies.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The required skills includes strong lobbyist experience specializing in the areas of water, wastewater, power and infrastructure; expert knowledge of relevant legislation and initiatives that directly or indirectly affect the SFPUC; and established relationships with members of the U.S. Congress, the Federal Administration, and appropriate government agencies.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 0923, Manager II; 0933, Manager V;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
Yes, an office in Washington, DC.

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

None, the level of legislative representation needed in Washington, DC for this work do not currently exist within the City. These services would require dedicated staff to be based in the federal capitol in order to attend meetings with federal public officials and administrators, and testify at hearings on behalf of the Department.

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

- A. Explain why civil service classes are not applicable.
Civil service classes may be relevant to portions of the work, but there is no one particular class or group of classes that encompasses the specific qualifications and expertise required for these services, and the work must be performed in Washington, DC on a daily basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, adopting a new civil service class would not address the advantages of hiring a specialist who has the resources and level of contact with congressional and administrative staff required to effectively advocate on behalf of the Department.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. None.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 10/28/2016, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Management & Superv Local 21; Municipal Executive Association; 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: Stacey Lo Phone: 415-554-6732 Email: Stacey.Lo@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46714 - 16/17

DHR Analysis/Recommendation:

action date: 01/09/2017

Commission Approval Required

Approved by Civil Service Commission

01/09/2017 DHR Approved for 01/09/2017

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: BOARD OF SUPERVISORS

Dept. Code: BOS

Type of Request: Initial Modification of an existing PSC (PSC # 47220 - 16/17)

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

Type of Service: Legislative Management System

Funding Source: General Fund

PSC Original Approved Amount: \$390,000 PSC Original Approved Duration: 01/01/18 - 12/31/23 (6 years)

PSC Mod#1 Amount: \$150,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 12/23/22-12/31/25 (2 years 1 day)

PSC Cumulative Amount Proposed: \$540,000 PSC Cumulative Duration Proposed: 8 years 1 day

1. Description of Work

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

The Office of the Clerk of the Board's (COB) seeks a vendor to enhance or replace an aging and costly LMS with a solution to effectively address mandated requirements, streamline legislative workflow, and meet stakeholder expectations. The COB will adopt a legislative system that will streamline the process of 1) drafting, submitting, and accessing status of legislation, 2) developing and managing public meeting agenda, and 3) ensuring the integrity and retention of legislative records. The LMS would not only support the core business of the Board of Supervisors, but all City Departments and agencies that submit and recommend legislation and/or amendments. The technology solution will be developed, implemented, and supported through a software development and support agreement with the Contractor and internal COB IT staff.

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

The San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the COB processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. Denial of this request will not allow a support agreement to be made with the LMS Contractor for this project, which would not hold the vendor accountable for oversight.

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

D. Will the contract(s) be renewed?
Yes, there will be the possibility of modification for extension up to an additional five years.

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 current Legislative Management System (LMS) contract was approved in 2006 by Civil Service Commission Resolution No. 0617-06-8 (PSC No. 4039-06/07), and extended in 2013. The Office of the Clerk of the Board (COB) requires a Contractor to provide a mission-critical legislative system and support for the next 5 years to ensure the ongoing management, integrity, and retention of legislative actions and records.

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

The San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the Office of the Clerk of the Board’s (COB) processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. The LMS is a mission-critical tool necessary to support the core business of the Board of Supervisors. Training by the selected Contractor is necessary due to the proprietary nature of LMS software, and will be required during the implementation stages. Contractor will also be providing a customized software solution, infrastructure, and support to ensure accountability and mitigate risk - resources that the City cannot provide.

B. Reason for the request for modification:

The modification is for a no-cost extension to the existing contract with Granicus, Inc. The term of the existing contract ends August 31, 2023. The Board of Supervisors will amend the existing contract to extend the contract by two years and four months so that the term of the agreement ends on December 31, 2025.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Requires experience and knowledge of proprietary LMS software and infrastructure. The Contractor will develop, customize, install, and provide user training for Legislative Management software to assist in meeting mandated requirements.

B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1044, IS Engineer-Principal; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the Contractor will provide a customized software solution, infrastructure, and support overhead.

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 City does not have the proprietary resources and expertise required to provide a customized solution and training program on the LMS.

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. Training will be specialized and required during the implementation stages only. The as-needed software support is also specialized and does not warrant the overhead of creating a new classification. Day-to-day maintenance can be provided by existing staff once they are trained.

6. Additional Information

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

7. Union Notification: On 12/23/22, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Wilson Ng Phone: 4155547725 Email: wilson.l.ng@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 244, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47220 - 16/17

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

From: [DHR-PSCCoordinator, DHR \(HRD\)](#) on behalf of [Ng, Wilson \(BOS\)](#)
To: [Ng, Wilson \(BOS\)](#); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Modification Request to PSC # 47220 - 16/17 - MODIFICATIONS
Date: Friday, December 23, 2022 1:09:10 PM

PSC RECEIPT of Modification notification sent to Unions and DHR

The BOARD OF SUPERVISORS -- BOS has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period December 23, 2022 – 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:

<http://apps.sfgov.org/dhrdrupal/node/11778>

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

Additional Attachment(s)

Legislative Management System – Training

Trainee Level	Training Functions	Approximate Trainees
Project Team & Stakeholders (~4 hours)	Acceptance Testing Variance Report	7
System Administrators (~4 hours)	Assign security to all users. Make additions/changes/deletions. Interpret and respond to all system messages. Monitor system usage, audit tracking. Install application software for new users. Install software patches and system updates. Use software configuration management tools. Perform sophisticated data queries. Maintain system integrity.	4
Legislative Clerks (~4 hours)	Create/Modify Legislative actions Agenda/Minutes preparation System search functions Query/Reporting Document management	8
Legislative Aides (~11 hours)	Legislative submission System search functions Query/Reporting	33
Department Legislative Liaisons (~2 hours)	Legislative submission System search functions Query/Reporting	30
Operations Staff - Clerical (~2 hours)	System search functions Query/Reporting Document management	5

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: BOARD OF SUPERVISORSDept. Code: BOSType of Request: Initial Modification of an existing PSC (PSC # 47220 - 16/17)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Legislative Management SystemFunding Source: General FundPSC Original Approved Amount: \$390,000 PSC Original Approved Duration: 01/01/18 - 12/31/23 (6 years)PSC Mod#1 Amount: \$150,000 PSC Mod#1 Duration: no duration addedPSC Cumulative Amount Proposed: \$540,000 PSC Cumulative Duration Proposed: 6 years**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of the Clerk of the Board's (COB) seeks a vendor to enhance or replace an aging and costly LMS with a solution to effectively address mandated requirements, streamline legislative workflow, and meet stakeholder expectations. The COB will adopt a legislative system that will streamline the process of 1) drafting, submitting, and accessing status of legislation, 2) developing and managing public meeting agenda, and 3) ensuring the integrity and retention of legislative records. The LMS would not only support the core business of the Board of Supervisors, but all City Departments and agencies that submit and recommend legislation and/or amendments. The technology solution will be developed, implemented, and supported through a software development and support agreement with the Contractor and internal COB IT staff.

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

The San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the COB processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. Denial of this request will not allow a support agreement to be made with the LMS Contractor for this project, which would not hold the vendor accountable for oversight.

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 47220 - 16/17

D. Will the contract(s) be renewed?

Yes, there will be the possibility of modification for extension up to an additional five years.

- 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 current Legislative Management System (LMS) contract was approved in 2006 by Civil Service Commission Resolution No. 0617-06-8 (PSC No. 4039-06/07), and extended in 2013. The Office of the Clerk of the Board (COB) requires a Contractor to provide a mission-critical legislative system and support for the next 5 years to ensure the ongoing management, integrity, and retention of legislative actions and records.

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

- A. Display all that apply

- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the Office of the Clerk of the Board's (COB) processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. The LMS is a mission-critical tool necessary to support the core business of the Board of Supervisors. Training by the selected Contractor is necessary due to the proprietary nature of LMS software, and will be required during the implementation stages. Contractor will also be providing a customized software solution, infrastructure, and support to ensure accountability and mitigate risk - resources that the City cannot provide.

- B. Reason for the request for modification:

\$30,000/year for 5 years for proprietary Legislative Management Software maintenance

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

- A. Specify required skills and/or expertise: Requires experience and knowledge of proprietary LMS software and infrastructure. The Contractor will develop, customize, install, and provide user training for Legislative Management software to assist in meeting mandated requirements.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1044, IS Engineer-Principal; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the Contractor will provide a customized software solution, infrastructure, and support overhead.

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 City does not have the proprietary resources and expertise required to provide a customized solution and training program on the LMS.

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. Training will be specialized and required during the implementation stages only. The as-needed software support is also specialized and does not warrant the overhead of creating a new classification. Day-to-day maintenance can be provided by existing staff once they are trained.

6. Additional Information

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

No.

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

Contractor will provide required training to ensure successful implementation and operation of the new LMS system. See attached for training requirements.

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 07/26/18, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21;

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

Name: Wilson Ng Phone: 4155547725 Email: wilson.l.ng@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 244, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47220 - 16/17

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 08/03/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: BOARD OF SUPERVISORS -- BOS

Dept. Code: BOS

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

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

Type of Service: Legislative Management System

Funding Source: General Fund

PSC Amount: \$390,000

PSC Est. Start Date: 01/01/2018

PSC Est. End Date

12/31/2023

1. Description of Work

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

The Office of the Clerk of the Board's (COB) seeks a vendor to enhance or replace an aging and costly LMS with a solution to effectively address mandated requirements, streamline legislative workflow, and meet stakeholder expectations. The COB will adopt a legislative system that will streamline the process of 1) drafting, submitting, and accessing status of legislation, 2) developing and managing public meeting agenda, and 3) ensuring the integrity and retention of legislative records. The LMS would not only support the core business of the Board of Supervisors, but all City Departments and agencies that submit and recommend legislation and/or amendments. The technology solution will be developed, implemented, and supported through a software development and support agreement with the Contractor and internal COB IT staff.

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

The San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the COB processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. Denial of this request will not allow a support agreement to be made with the LMS Contractor for this project, which would not hold the vendor accountable for oversight.

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

This service has been provided in the past. The last LMS contract was approved in 2006 by Civil Service Commission Resolution No. 0617-06-8 (PSC No. 4039-06/07), and extended in 2013.

D. Will the contract(s) be renewed?

Yes, there will be the possibility of modification for extension up to an additional five years.

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 current Legislative Management System (LMS) contract was approved in 2006 by Civil Service Commission Resolution No. 0617-06-8 (PSC No. 4039-06/07), and extended in 2013. The Office of the Clerk of the Board (COB) requires a Contractor to provide a mission-critical legislative system and support for the next 5 years to ensure the ongoing management, integrity, and retention of legislative actions and records.

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 San Francisco Board of Supervisors (BOS) is the legislative branch of government that responds to the needs of the people of the City and County of San Francisco, establishes city policies, and adopts ordinances and resolutions. The Office of the Clerk of the Board (COB) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. On average, the Office of the Clerk of the Board's (COB) processes over 1,400 legislative files/items on average annually and subject to legal noticing timeframes for meetings. The LMS is a mission-critical tool necessary to support the core business of the Board of Supervisors. Training by the selected Contractor is necessary due to the proprietary nature of LMS software, and will be required during the implementation stages. Contractor will also be providing a customized software solution, infrastructure, and support to ensure accountability and mitigate risk - resources that the City cannot provide.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Requires experience and knowledge of proprietary LMS software and infrastructure. The Contractor will develop, customize, install, and provide user training for Legislative Management software to assist in meeting mandated requirements.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1044, IS Engineer-Principal; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the Contractor will provide a customized software solution, infrastructure, and support overhead.

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

This work requires proprietary knowledge of legislative software for proper development, implementation, and training. The department has scoped business requirements and determined that there will be significant liability and overhead by bringing services in-house.

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 the proprietary resources and expertise required to provide a customized solution and training program on the LMS.

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. Training will be specialized and required during the implementation stages only. The as-needed software support is also specialized and does not warrant the overhead of creating a new classification. Day-to-day maintenance can be provided by existing staff once they are trained.

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. Contractor will provide required training to ensure successful implementation and operation of the new LMS system. See attached for training requirements.

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

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

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

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

7. Union Notification: On 12/02/2016, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Wilson Ng Phone: 4155547725 Email: wilson.l.ng@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 244 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47220 - 16/17

DHR Analysis/Recommendation:

action date: 02/06/2017

Commission Approval Required

Approved by Civil Service Commission

02/06/2017 DHR Approved for 02/06/2017

PERSONAL SERVICES CONTRACT SUMMARY

DATE: 8/22/06

DEPARTMENT NAME Board of Supervisors DEPARTMENT NUMBER 01

TYPE OF APPROVAL: [] EXPEDITED [X] REGULAR (OMIT POSTING [])
[] CONTINUING [] ANNUAL

TYPE OF REQUEST:

[X] INITIAL REQUEST [] MODIFICATION (PSC# [])

TYPE OF SERVICE: Software Acquisition, customization, installation, and user training

FUNDING SOURCE: General Fund

PSC AMOUNT: \$325,000

PSC DURATION: October 2006-October 2007

1. DESCRIPTION OF WORK

A. Concise description of proposed work:

Legislative tracking software will be acquired, customized by vendor to meet some SF requirements not already met by off-the-shelf system, installed on the Board of Supervisors' server. Users will be trained by vendor, including 'Train the Trainer' sessions.

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

The Board of Supervisors must replace its obsolete legislative tracking system. Denial places the department at risk by continuing use of a system that may not be repairable should a system crash occur.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number):

This is a one-time service.

D. Will the contract(s) be renewed: The contract will not be renewed.

2. UNION NOTIFICATION: Copy of this summary is to be sent to employee organizations as appropriate (refer to instructions for specific procedures):

local 21 Union Name, [Signature] Signature of person mailing / faxing form, 8/22/06 Date

RFP sent to local 21 Union Name, on 8/9/06 Date, [Signature] Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4039-06/07
STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:

approved [Signature]

RECEIVED BY DEPARTMENT OF HUMAN RESOURCES 06/22/06 10:32 AM 7:43

20

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise: **The contractor will install a proprietary legislative tracking software system, as customized/modified for the San Francisco legislative environment, and will provide training to department staff, including Train the Trainer sessions for department civil service staff.**

B. Which, if any, civil service class normally performs this work? **1053, 1054, 1063, 1064**

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

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable: **The off-the-shelf system already meets 90% of the Board of Supervisors' requirements. Customization of the existing system should be performed by the vendor's programmer staff.**

B. Would it be practical to adopt a new civil service class to perform this work? **No** Explain. **The work to be performed is proprietary, and is being done on a one-time basis.**

5. ADDITIONAL INFORMATION (if "yes", attach explanation)

Yes No

A. Will the contractor directly supervise City and County employees?

B. Will the contractor train City and County employees?

- Describe training and indicate approximate number of hours. **System user and Administrator training. Approximately 100 hours.**

- Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate number to be trained. **Legislative data entry clerks, legislative aides, BOS IT staff.**

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

D. Are there federal or state grant requirements regarding the use of contractual services?

E. Has a board or commission determined that contracting is the most effective way to provide this service?

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD:

Madeleine Licavoli

Signature of Departmental Personal Services Contract Coordinator

Madeleine Licavoli
Print or Type Name

(415) 554-7722
Telephone Number

1 Carlton B. Goodlett Place

Room 244

Address

21

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 43379 - 19/20)

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

Type of Service: Cardiac Rhythm Monitoring

Funding Source: General Fund

PSC Original Approved Amount: \$1,500,000 PSC Original Approved Duration: 05/01/20 - 04/30/23 (2 years 52 weeks)

PSC Mod#1 Amount: \$1,500,000 PSC Mod#1 Duration: 05/01/23-12/31/30 (7 years 35 weeks)

PSC Cumulative Amount Proposed: \$3,000,000 PSC Cumulative Duration Proposed: 10 years 35 weeks

1. Description of Work

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

The contractor will provide a unique cardiac rhythm monitoring device in the form of small adhesive wireless device worn on a patient's chest in an adhesive patch, as well as related data analysis. The patch-monitors provide continuous electrocardiogram (ECG) monitoring, typically for up to 14 days. They replace the traditional cardiac rhythm monitoring device, a small camera-sized device worn by patients around the neck on a cord and connected to silver dollar-sized electrodes attached to the chest. Utilization of these patch-monitors enables either the health care provider or the patient themselves to place the patch-monitor on the patient's chest. After the monitoring period, the contractor analyzes and uploads the results to a secure website, where the the health care provider--the Department of Public Health staff--may view them. The amount of this PSC includes an anticipated expansion of this service, as the Department must increasingly utilize telemedicine services in order to provide appropriate patient care due to the need to shelter-in-place in response to COVID-19.

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

The Department increased its use of cardiac rhythm patch-monitors after using the devices for one year through an initiative sponsored by the University of California at San Francisco (UCSF), which showed a significant improvement in the length of time that may be monitored, which with the earlier monitoring devices was limited to 48 hours of data, as compared to 14 days with the patch-monitor. The patch-monitors may also be worn more easily during normal activity, and is waterproof, so the diagnostic yield is far better. Denial will result in discontinuation of this more effective method of cardiac rhythm monitoring, and related negative impact on the quality of services provided to the patients.

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 43379 - 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:

The duration as modified will be more than five years because there will be a continued need to use the vendor supplied cardiac monitoring devices. Cardiac monitoring devices are vendor supplied and proprietary to the Original Equipment Manufacturer and the City does not build, develop or support such devices.

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 contractor will provide cardiac rhythm monitor patches, data analysis, and a secure website to review the results. This device and accompanying service will enable civil service employees to meet industry standards for cardiac

monitoring.

B. Reason for the request for modification:

To extend the term and increase the amount to account for the ongoing need for these services.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Contractor must have a cardiac rhythm monitor commercially available for use, and the associated services to support the device.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2430, Medical Evaluations Assistant;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor will provide the patch, data analysis, and a secure website to review the results.

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 are not applicable because the City would have to develop its own patch and monitoring system, as well as support services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the usage of this device and service complements the work of existing civil service staff who use it to monitor cardiac patients.

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 contractor provides a device (patch) that is sent to the patient to collect data. The results are then uploaded to the secured website. No training takes place.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 11/08/22, the Department notified the following employee organizations of this PSC/RFP request: SEIU 1021 Miscellaneous;

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43379 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 43379 - 19/20 - MODIFICATIONS

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

on behalf of

kelly.hiramoto@sfdph.org <kelly.hiramoto@sfdph.org>

Tue 11/8/2022 4:19 PM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;Najuawanda Daniels <najuawanda.daniels@seiu1021.org>;Jason Klumb <Jason.Klumb@seiu1021.org>;Frigault, Noah (HRC) <noah.frigault@sfgov.org>;Julie.Meyers@sfgov.org <Julie.Meyers@sfgov.org>;Thomas Vitale <thomas.vitale@seiu1021.org>;Ricardo.lopez@sfgov.org <Ricardo.lopez@sfgov.org>;Kbasconciello@sfgov.org <Kbasconciello@sfgov.org>;pcamarillo_seiu@sbcglobal.net <pcamarillo_seiu@sbcglobal.net>;Wendy Frigillana <wendy.frigillana@seiu1021.org>;pscreview@seiu1021.org <pscreview@seiu1021.org>;ted.zarzecki@seiu1021.net <ted.zarzecki@seiu1021.net>;davidmkersten@gmail.com <davidmkersten@gmail.com>;xiumin.li@seiu1021.org <xiumin.li@seiu1021.org>;Sin.Yee.Poon@sfgov.org <Sin.Yee.Poon@sfgov.org>;david.canham@seiu1021.org <david.canham@seiu1021.org>;jtanner940@aol.com <jtanner940@aol.com>;Longhitano, Robert (DPH) <robert.longhitano@sfdph.org>;DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@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 \$1,500,000 for services for the period May 1, 2023

– December 31, 2030. 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/19408>

Email sent to the following addresses: jtanner940@aol.com
david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org xiumin.li@seiu1021.org
davidmkersten@gmail.com ted.zarzecki@seiu1021.net pscreview@seiu1021.org
Wendy.Frigillana@seiu1021.org pcamarillo_seiu@sbcglobal.net
Kbasconciello@sfgov.org Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org
Julie.Meyers@sfgov.org noah.frigault@sfgov.org jason.klumb@seiu1021.org
najuawanda.daniels@seiu1021.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Cardiac Rhythm Monitoring

Funding Source: General Fund

PSC Duration: 2 years 52 weeks

PSC Amount: \$1,500,000

1. Description of Work

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

The contractor will provide a unique cardiac rhythm monitoring device in the form of small adhesive wireless device worn on a patient's chest in an adhesive patch, as well as related data analysis. The patch-monitors provide continuous electrocardiogram (ECG) monitoring, typically for up to 14 days. They replace the traditional cardiac rhythm monitoring device, a small camera-sized device worn by patients around the neck on a cord and connected to silver dollar-sized electrodes attached to the chest. Utilization of these patch-monitors enables either the health care provider or the patient themselves to place the patch-monitor on the patient's chest. After the monitoring period, the contractor analyzes and uploads the results to a secure website, where the the health care provider--the Department of Public Health staff--may view them. The amount of this PSC includes an anticipated expansion of this service, as the Department must increasingly utilize telemedicine services in order to provide appropriate patient care due to the need to shelter-in-place in response to COVID-19.

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

The Department increased its use of cardiac rhythm patch-monitors after using the devices for one year through an initiative sponsored by the University of California at San Francisco (UCSF), which showed a significant improvement in the length of time that may be monitored, which with the earlier monitoring devices was limited to 48 hours of data, as compared to 14 days with the patch-monitor. The patch-monitors may also be worn more easily during normal activity, and is waterproof, so the diagnostic yield is far better. Denial will result in discontinuation of this more effective method of cardiac rhythm monitoring, and related negative impact on the quality of services provided to the patients.

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.
42823-15/16

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

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The contractor will provide cardiac rhythm monitor patches, data analysis, and a secure website to review the results. This device and accompanying service will enable civil service employees to meet industry standards for cardiac monitoring.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must have a cardiac rhythm monitor commercially available for use, and the associated services to support the device.

B. Which, if any, civil service class(es) normally perform(s) this work? 2430, Medical Evaluations Assistant;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor will provide the patch, data analysis, and a secure website to review the results.

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

The City does not have the available resources to develop and provide support for its own patch. Returning to the earlier, less effective monitor will have a negative impact on the quality of services provided to the patients of DPH.

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 because the City would have to develop its own patch and monitoring system, as well as support services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the usage of this device and service complements the work of existing civil service staff who use it to monitor cardiac patients.

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 contractor provides a device (patch) that is sent to the patient to collect data. The results are then uploaded to the secured website. No training takes place.

- 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 04/20/2020, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous

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

Name: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43379 - 19/20

DHR Analysis/Recommendation:

action date: 07/20/2020

Commission Approval Required

Approved by Civil Service Commission

07/20/2020 DHR Approved for 07/20/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 44711 - 20/21)

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

Type of Service: Administration of Regional Heat Pump Water Heater Incentive Program

Funding Source: CleanPowerSF Capital Program

PSC Original Approved Amount: \$.450,000 PSC Original Approved Duration: 08/01/21 - 03/31/23 (1 year 34 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 01/06/23-07/01/26 (3 years 13 weeks)

PSC Cumulative Amount Proposed: \$.450,000 PSC Cumulative Duration Proposed: 4 years 47 weeks

1. Description of Work

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

The purpose of this agreement is to allow SFPUC to join The Bay Area Regional Heat Pump Water Heater Contractor Incentive Program, which is a cooperative program implemented by public agencies across the Bay Area that provides workforce development through contractor training and incentives for installation of energy-efficient heat pump water heaters (HPWH). The program is administered by The Energy Council, a Joint Powers Agency based in Alameda County. The program is currently available in the counties of Alameda, Contra Costa, Marin, Napa, and Solano and the cities of Santa Clara and Tracy.

The Energy Council is implementing the program in conjunction with Energy Solutions, a consultant they have contracted with directly. The scope of work with Energy Solutions includes the following: administrative services, including handling incentive applications and processing; program management services, including invoicing and reporting, contractor training and engagement, including developing training content, delivering training to contractors, and encouraging contractors to register in the program's web portal.

The Energy Council will be responsible for convening meetings with participating agencies to discuss the program, provide updates, and solicit feedback. The Energy Council will inform participating agencies of new policies and programs in the region or state that impact HPWH sales and will provide trainings on codes for HPWHs to building department staff. Lastly, the Energy Council will hold all funds contributed by participating agencies in an account insured by the Federal Deposit Insurance Corporation.

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

Heat pump water heaters are a new technology that uses electricity to efficiently heat water in homes, which reduces greenhouse gas emissions. Currently, few contractors in the Bay Area have experience installing this technology. This agreement would allow SFPUC to join an existing regional program that provides training and incentives to contractors for installing heat pump water heaters. SFPUC seeks to join this regional program, rather than develop and launch its own program, because it believes that a regional approach will be more efficient and effective in this case. This regional program provides consistent, streamlined program design, including consistent program rules and incentive levels across multiple jurisdictions, as well as having a centralized application process for participating contractors. Because the electrical and plumbing contractors who are qualified to install heat pump water heaters often provide services across the Bay Area's jurisdictional boundaries, this regional program prevents contractors from having to manage the complexity of participating in multiple programs for each jurisdiction they serve. Additionally, by joining this program, SFPUC benefits from the program infrastructure and processes that have already been developed, such as the program web portal and administrative services, which will allow the program's benefits to reach recipients sooner, and save SFPUC ratepayer funds. Failure to approve the SFPUC contract with the Energy Council to participate in the Bay Area Regional Heat Pump Water Heater Contractor Incentive Program would result in a missed opportunity

to support regional workforce development and to decrease greenhouse gas emissions through deployment of heat pump water heater technology.

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 44711 - 20/21

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.

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

Explain the qualifying circumstances:

SFPUC seeks to enter this agreement to participate in a short-term program, of a duration of 3 years. The agreement would allow SFPUC to take advantage of program systems, infrastructure and processes that have already been developed, such as training materials, a program application web portal and administrative services and processes, as well as industry-specific knowledge about heat pump water heater technology. Additionally, the program has a regional reach, beyond what SFPUC could achieve by launching a similar program of its own.

B. Reason for the request for modification:

The Bay Area Regional Heat Pump Water Heater Contractor Incentive Program was launched in April 2019 to increase the adoption of heat pump water heater technology in the region by providing contractor and distributor training and incentives for installation of heat pump water heater units in residential settings. Community choice aggregators and public utilities in the Bay Area who have been participating in this program for the past few years have built a strong workforce serving their region of this new technology. San Francisco has only been operating in this program since May 2022 and the PSC is approved through March 2023, just as it is starting to gain participants in this program and build momentum. Therefore, the SFPUC would like to extend this PSC in order to be able to continue to participate in this very important regional program.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience and expertise in implementing building electrification programs, including this program which is already operational; (2) technical knowledge regarding heat pump water heater technology; (3) experience managing consultants that provide administrative, program management, technical, and contractor engagement services; (4) experience engaging with Community Choice Aggregators, Publicly-Owned Utilities, and local governments.

B. Which, if any, civil service class(es) normally perform(s) this work? 1825, Prnpl Admin Analyst II; 5601, Utility Analyst; 5602, Utility Specialist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide the necessary IT software to support submission and processing of incentive applications and data services for the program.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

While certain functions performed under this contract could be performed by civil service staff, the primary benefit of this agreement is to participate in an existing regional program. As discussed above, if the SFPUC launched a program serving only San Francisco it would not be as effective or efficient as this region-wide program. Additionally, joining this program allows SFPUC to benefit from existing program resources such as training materials, a web application portal, and administrative processes that allow for the program to be launched in less time and using fewer ratepayer funds than if SFPUC built its own similar program.

- 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: As indicated above, some of the functions performed under this contract could be performed by existing civil service classifications. However, due to the program's regional nature, it is not practical or feasible to conduct these activities internally while still participating in the program.

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, the Energy Council will provide training to help increase awareness of heat pump water heaters (HPWHs) and their mandated requirements among inspectors and other building department-related staff. Energy Council and the SFPUC will promote these trainings to the Department of Building Inspection, the Department of the Environment, and SFPUC staff. The trainings are typically conducted on a quarterly basis. SFPUC staff estimate the Energy Council will provide approximately eight hours of training for this purpose. The goal is to train as many relevant stakeholders as possible to prepare building department staff for an increase in permits for this technology and to ease the permitting process. Furthermore, the Energy Council will provide SFPUC program managers with briefings and updates on local and state policies relevant to deployment of HPWHs. The Energy Council convenes with program managers on a monthly basis. SFPUC staff estimate that these briefings will not total more than 25 hours. The SFPUC program managers include: a Principal Administrative Analyst II (1825), a Utility Specialist, and a Utility Analyst.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
SFPUC Resolution No. 20-0166
- 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 01/06/23, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44711 - 20/21

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 02/06/2023

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfgov.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); junko.laxamana@sfgov.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; L21PSCReview@ifpte21.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 44711 - 20/21 - MODIFICATIONS
Date: Friday, January 6, 2023 3:40:35 PM

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

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

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period January 6, 2023 – July 1, 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/19724>

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)

PUBLIC UTILITIES COMMISSION

City and County of San Francisco

RESOLUTION NO. 20-0166

WHEREAS, The San Francisco Board of Supervisors established a Community Choice Aggregation (CCA) program in 2004 (Ordinance 86-04) and has implemented the program, called CleanPowerSF, through the work of the San Francisco Public Utilities Commission in consultation with the San Francisco Local Agency Formation Commission (Ordinances 146-07, 147-07, and 232-09); and

WHEREAS, The Energy Council is a joint powers agency comprised of Alameda County and all cities in Alameda County and was formed to seek funding to develop and implement programs and policies that reduce energy demand, increase energy efficiency, advance the use of clean, efficient and renewable resources, and help create climate resilient communities; and

WHEREAS, Installation of heat pump water heaters (HPWH) in residential settings as soon as practical is essential to reducing greenhouse gases, and the urgent and immediate reduction of those emissions will reduce the long term, cumulative impacts of these pollutants on the environment; and

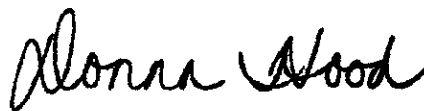
WHEREAS, The Energy Council is administering the Bay Area Regional Heat Pump Water Heater Contractor Incentive Program using funding provided under this Cooperative Agreement by participating agencies; and

WHEREAS, Services under the Cooperative Agreement are anticipated to begin in August, 2020 and will end no later than March 31, 2023, for a total contract duration of 32 months; and

WHEREAS, The fiscal impact to participate in the program is expected to not exceed \$450,000 for the duration of this agreement; now, therefore, be it

RESOLVED, That this Commission hereby authorizes the General Manager of the San Francisco Public Utilities Commission to execute a Cooperative Agreement with The Energy Council in the form on file with the Commission Secretary for an amount not-to-exceed \$450,000 for the 32-month program duration, terminating March 31, 2023, and authorizing the General Manager to approve modifications to the Cooperative Agreement that do not materially change the benefits to or obligations of the SFPUC under the agreement.

I hereby certify that the foregoing resolution was adopted by the Public Utilities Commission at its meeting July 28, 2020.



Secretary, Public Utilities Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Administration of Regional Heat Pump Water Heater Incentive Program

Funding Source: CleanPowerSF Capital Program

PSC Duration: 1 year 34 weeks

PSC Amount: \$450,000

1. Description of Work

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

The purpose of this agreement is to allow SFPUC to join The Bay Area Regional Heat Pump Water Heater Contractor Incentive Program, which is a cooperative program implemented by public agencies across the Bay Area that provides workforce development through contractor training and incentives for installation of energy-efficient heat pump water heaters (HPWH). The program is administered by The Energy Council, a Joint Powers Agency based in Alameda County. The program is currently available in the counties of Alameda, Contra Costa, Marin, Napa, and Solano and the cities of Santa Clara and Tracy.

The Energy Council is implementing the program in conjunction with Energy Solutions, a consultant they have contracted with directly. The scope of work with Energy Solutions includes the following: administrative services, including handling incentive applications and processing; program management services, including invoicing and reporting, contractor training and engagement, including developing training content, delivering training to contractors, and encouraging contractors to register in the program's web portal.

The Energy Council will be responsible for convening meetings with participating agencies to discuss the program, provide updates, and solicit feedback. The Energy Council will inform participating agencies of new policies and programs in the region or state that impact HPWH sales and will provide trainings on codes for HPWHs to building department staff. Lastly, the Energy Council will hold all funds contributed by participating agencies in an account insured by the Federal Deposit Insurance Corporation.

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

Heat pump water heaters are a new technology that uses electricity to efficiently heat water in homes, which reduces greenhouse gas emissions. Currently, few contractors in the Bay Area have experience installing this technology. This agreement would allow SFPUC to join an existing regional program that provides training and incentives to contractors for installing heat pump water heaters. SFPUC seeks to join this regional program, rather than develop and launch its own program, because it believes that a regional approach will be more efficient and effective in this case. This regional program provides consistent, streamlined program design, including consistent program rules and incentive levels across multiple jurisdictions, as well as having a centralized application process for participating contractors. Because the electrical and plumbing contractors who are qualified to install heat pump water heaters often provide services across the Bay Area's jurisdictional boundaries, this regional program prevents contractors from having to manage the complexity of participating in multiple programs for each jurisdiction they serve. Additionally, by joining this program, SFPUC benefits from the program

infrastructure and processes that have already been developed, such as the program web portal and administrative services, which will allow the program's benefits to reach recipients sooner, and save SFPUC ratepayer funds. Failure to approve the SFPUC contract with the Energy Council to participate in the Bay Area Regional Heat Pump Water Heater Contractor Incentive Program would result in a missed opportunity to support regional workforce development and to decrease greenhouse gas emissions through deployment of heat pump water heater technology.

- 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 a new agreement to participate in a new program. The service proposed in the agreement has not been previously provided to SFPUC.

- D. Will the contract(s) be renewed?
No

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

2. Reason(s) for the Request

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

- B. Explain the qualifying circumstances:

SFPUC seeks to enter this agreement to participate in a short-term program, of a duration of 3 years. The agreement would allow SFPUC to take advantage of program systems, infrastructure and processes that have already been developed, such as training materials, a program application web portal and administrative services and processes, as well as industry-specific knowledge about heat pump water heater technology. Additionally, the program has a regional reach, beyond what SFPUC could achieve by launching a similar program of its own.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience and expertise in implementing building electrification programs, including this program which is already operational; (2) technical knowledge regarding heat pump water heater technology; (3) experience managing consultants that provide administrative, program management, technical, and contractor engagement services; (4) experience engaging with Community Choice Aggregators, Publicly-Owned Utilities, and local governments.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1825, Prnpl Admin Analyst II; 5601, Utility Analyst; 5602, Utility Specialist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide the necessary IT software to support submission and processing of incentive applications and data services for the program.

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

As described in 1B above, SFPUC seeks to benefit from joining an existing regional program. Launching its own, similar program would result in additional complexity for contractors that the program aims to reach, resulting in a less effective program than if it was provided by SFPUC alone. If approved, SFPUC staff would oversee the program, participate in meetings and educational opportunities to build expertise in this subject area, and would perform outreach and marketing for the program.

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

A. Explain why civil service classes are not applicable.

While certain functions performed under this contract could be performed by civil service staff, the primary benefit of this agreement is to participate in an existing regional program. As discussed above, if the SFPUC launched a program serving only San Francisco it would not be as effective or efficient as this region-wide program. Additionally, joining this program allows SFPUC to benefit from existing program resources such as training materials, a web application portal, and administrative processes that allow for the program to be launched in less time and using fewer ratepayer funds than if SFPUC built its own similar program.

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. As indicated above, some of the functions performed under this contract could be performed by existing civil service classifications. However, due to the program's regional nature, it is not practical or feasible to conduct these activities internally while still participating in the program.

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 Energy Council will provide training to help increase awareness of heat pump water heaters (HPWHs) and their mandated requirements among inspectors and other building department-related staff. Energy Council and the SFPUC will promote these trainings to the Department of Building Inspection, the Department of the Environment, and SFPUC staff. The trainings are typically conducted on a quarterly basis. SFPUC staff estimate the Energy Council will provide approximately eight hours of training for this purpose. The goal is to train as many relevant stakeholders as possible to prepare building department staff for an increase in permits for this technology and to ease the permitting process. Furthermore, the Energy Council will provide SFPUC program managers with briefings and updates on local and state policies relevant to deployment of HPWHs. The Energy Council convenes with program managers on a monthly basis. SFPUC staff estimate that these briefings will not total more than 25 hours. The SFPUC program managers include: a Principal Administrative Analyst II (1825), a Utility Specialist, and a Utility Analyst.

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

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

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
Yes. SFPUC Resolution No. 20-0166

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 05/19/2021, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@swater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44711 - 20/21

DHR Analysis/Recommendation:

action date: 07/19/2021

Commission Approval Required

Approved by Civil Service Commission

07/19/2021 DHR Approved for 07/19/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 45469 - 19/20)

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

Type of Service: Capital Project Control Systems Integration and Support Services(PRO.0144).

Funding Source: Capital Budgets - SSIP, WECIP, and HCIP

PSC Original Approved Amount: \$9,500,000 PSC Original Approved Duration: 04/20/20 - 04/19/25 (5 years)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 12/30/22-12/31/28 (3 years 36 weeks)

PSC Cumulative Amount Proposed: \$9,500,000 PSC Cumulative Duration Proposed: 8 years 36 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 Control Group (PCG) staff in the administration, improvement and programming of PCG's Primavera-based Program Control, Capital Planning and Construction Management Systems to integrate it with various other databases to generate reports and update capital program and project data (This is not to provide scheduling and cost estimating services).

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

The development of a capital planning, construction management, project management systems, implementation of customized dashboards to track project cost and schedule and support of SFPUC's capital planning is the responsibility of PCG. The development and implementation of these integrated systems requires specific experience and specialized expertise that not available through City staff. Failure to meet these objectives would result in the inability of the SFPUC to successfully complete the SSIP, WECIP, HCIP, and other critical capital improvement programs and projects on time and on schedule.

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 45469 - 19/20

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

City staff do not have the experience to conduct an assessment to identify organizational needs and to identify the components necessary to provide a solution to successfully integrate and deploy Unifier to meet the PUC's immediate needs and long term goals. Once these tasks are completed and staff are trained, consultants will no longer be needed.

B. Reason for the request for modification:

This request is needed in order for the consultant to provide continuous specialized support to the Program Controls Group in Primavera-based program controls system administration, integration, cost control services, 10-year capital plan, and annual CIP budget.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. Extensive knowledge with Oracle/Primavera products (P6 and Unifier) 2. JavaScript programming 3. Experienced with design and analysis of Oracle, Microsoft SQL, and Microsoft Access database 4. Specialization 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; 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;

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 associated with this work are specialized. City staff do not have the experience to conduct an assessment to identify organizational needs and to identify the components necessary to provide a solution to successfully intergrate and deploy Unifier to meet the PUC's immediate needs and long term goals.

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. Consultants are not required after program integration is completed. Maintenance of the system will be performed by the Civil Service Classes 104x and 105x after improvements are made.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
The Contractor will train and work with City Staff to integrate software to benefit PUC's Infrastructure Bureau, transferring that knowledge as part of the integration so that maintenance of the software and its future use is preserved by City Staff. Employees to be trained - (1) 5602, (1) 5601 (1) 104x IS Engineer Series, (1) 105x IS Business Analyst (16 hours x 4 staff) = 64 hours.

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 01/05/23, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45469 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); junko.laxamana@sfgov.org; amakayan@ifpte21.org; ecassidy@ifpte21.com;
WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org;
kpage@ifpte21.org; eerbach@ifpte21.org; L21PSCReview@ifpte21.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 45469 - 19/20 - MODIFICATIONS
Date: Thursday, January 5, 2023 11:52:00 AM

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

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

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 \$0 for services for the period December 30, 2022 – December 31, 2028. 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/19676>

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

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: Capital Project Control Systems Integration and Support Services(PRO.0144)

Funding Source: Capital Budgets - SSIP, WECIP, and HCIP PSC Duration: 5 years

PSC Amount: \$9,500,000

1. Description of Work

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

The scope of work is to augment, assist, and support Program Control Group (PCG) staff in the administration, improvement and programming of PCG's Primavera-based Program Control, Capital Planning and Construction Management Systems to integrate it with various other databases to generate reports and update capital program and project data (This is not to provide scheduling and cost estimating services).

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

The development of a capital planning, construction management, project management systems, implementation of customized dashboards to track project cost and schedule and support of SFPUC's capital planning is the responsibility of PCG. The development and implementation of these integrated systems requires specific experience and specialized expertise that not available through City staff. Failure to meet these objectives would result in the inability of the SFPUC to successfully complete the SSIP, WECIP, HCIP, and other critical capital improvement programs and projects on time and on schedule.

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.

Similar services have been provided in the past utilizing PSC No. 4173-07/08 (CS-939A&B) and PSC No. 4092-11/12 (CS-224).

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

City staff do not have the experience to conduct an assessment to identify organizational needs and to identify the components necessary to provide a solution to successfully integrate and deploy Unifier to meet the PUC's immediate needs and long term goals. Once these tasks are completed and staff are trained, consultants will no longer be needed.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. Extensive knowledge with Oracle/Primavera products (P6 and Unifier) 2. JavaScript programming 3. Experienced with design and analysis of Oracle, Microsoft SQL, and Microsoft Access database 4. Specialization 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; 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;

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?

These are specialized services and we currently have no available resources to perform these tasks. It has been difficult to recruit city resources with specialized skill sets for tasks related to customization and integration of P6 and Unifier projects with other databases to meet PUC's needs.

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

A. Explain why civil service classes are not applicable.

The tasks associated with this work are specialized. City staff do not have the experience to conduct an assessment to identify organizational needs and to identify the components necessary to provide a solution to successfully intergrate and deploy Unifier to meet the PUC's immediate needs and long term goals.

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. Consultants are not required after program integration is completed. Maintenance of the system will be performed by the Civil Service Classes 104x and 105x after improvements are made.

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. The Contractor will train and work with City Staff to integrate software to benefit PUC's Infrastructure Bureau, transferring that knowledge as part of the integration so that maintenance of the software and its future use is preserved by City Staff. Employees to be trained - (1) 5602, (1) 5601 (1) 104x IS Engineer Series, (1) 105x IS Business Analyst (16 hours x 4 staff) = 64 hours.

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

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

7. Union Notification: On 11/05/2019, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45469 - 19/20

DHR Analysis/Recommendation:

action date: 01/06/2020

Commission Approval Required

Approved by Civil Service Commission

01/06/2020 DHR Approved for 01/06/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request: Initial Modification of an existing PSC (PSC # 36741 - 19/20)

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

Type of Service: Smart Money Coaching-Transitional Age Youth

Funding Source: General funds

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/20 - 06/30/21 (1 year 12 weeks)

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 03/19/21-06/30/23 (2 years)

PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 12/20/22-06/30/25 (2 years 1 day)

PSC Cumulative Amount Proposed: \$1,200,000 PSC Cumulative Duration Proposed: 5 years 13 weeks

1. Description of Work

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach and meet the unique financial needs of at-risk transitional age youth (TAY), aged 16-24, including TAY experiencing homelessness. Smart Money Coaching will support TAY to build towards financial security through a number of strategies, including repairing and building their credit, accessing bank accounts with no hidden fees or overdraft, utilizing direct deposit and bill payment to manage their funds, and accessing safe, affordable credit.

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

This service is important to financially support at-risk transitional age youth receiving supportive services from the City such as workforce training and housing, many whom are coming in with financial issues and barriers. We are integrating SMC with the Department of Homelessness and Supportive Housing (HSH)'s Rising Up initiative to support 500 youth with rapid rehousing and workforce. Financial stability is key to ensuring housing and workforce stability so youth can build self-sufficiency over time. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with the TAY population to effectively support their financial needs.

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

Yes, PSC 36741-19/20

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:

Add money.

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 service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work. Coaches must be certified.

- B. Reason for the request for modification:
Exercising a contract option to extend for 2 years.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with at-risk transitional age youth (TAY) and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- 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 services are highly specialized and require individuals trained and certified as financial coaches.
- 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 service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

6. Additional Information

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

- 7. Union Notification:** On 12/20/22, 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: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36741 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of amanda.wentworth@sfgov.org
To: [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; [Wu, Kimmie \(TTX\)](mailto:Wu, Kimmie (TTX)); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator, DHR (HRD))
Subject: Receipt of Modification Request to PSC # 36741 - 19/20 - MODIFICATIONS
Date: Tuesday, December 20, 2022 4:13:34 PM

PSC RECEIPT of Modification notification sent to Unions and DHR

The TREASURER/TAX COLLECTOR -- TTX has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period December 20, 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/14587>

Email sent to the following addresses: L21PSCReview@ifpte21.org
amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org
wendywong26@yahoo.com WendyWong26@yahoo.com

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request: Initial Modification of an existing PSC (PSC # 36741 - 19/20)

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

Type of Service: Smart Money Coaching-Transitional Age Youth

Funding Source: General funds

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/20 - 06/30/21 (1 year 12 weeks)

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 03/19/21-06/30/23 (2 years)

PSC Cumulative Amount Proposed: \$1,200,000 PSC Cumulative Duration Proposed: 3 years 12 weeks

1. Description of Work

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach and meet the unique financial needs of at-risk transitional age youth (TAY), aged 16-24, including TAY experiencing homelessness. Smart Money Coaching will support TAY to build towards financial security through a number of strategies, including repairing and building their credit, accessing bank accounts with no hidden fees or overdraft, utilizing direct deposit and bill payment to manage their funds, and accessing safe, affordable credit.

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

This service is important to financially support at-risk transitional age youth receiving supportive services from the City such as workforce training and housing, many whom are coming in with financial issues and barriers. We are integrating SMC with the Department of Homelessness and Supportive Housing (HSH)'s Rising Up initiative to support 500 youth with rapid rehousing and workforce. Financial stability is key to ensuring housing and workforce stability so youth can build self-sufficiency over time. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with the TAY population to effectively support their financial needs.

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

Yes, PSC 36741-19/20

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:

Add money.

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 service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work. Coaches must be certified.

- B. Reason for the request for modification:
Adding time and money.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with at-risk transitional age youth (TAY) and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- 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 services are highly specialized and require individuals trained and certified as financial coaches.
- 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 service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
There will be no training as services must be performed by certified financial coaches with specialized knowledge and experience.
- 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 we are working with the same contractor from the original PSC

- 7. Union Notification:** On 03/19/21, 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: Kimmie Wu Phone: 415-554-4513 Email: Kimmie.wu@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36741 - 19/20

DHR Analysis/Recommendation:

05/03/2021

Commission Approval Required

Approved by Civil Service Commission

05/03/2021 DHR Approved for 05/03/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 44431 - 22/23)

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

Type of Service: Program Administration

Funding Source: Add-back funding

PSC Original Approved Amount: \$300,000 PSC Original Approved Duration: 11/01/22 - 01/31/24 (1 year 13 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 01/20/23-03/15/25 (1 year 6 weeks)

PSC Cumulative Amount Proposed: \$300,000 PSC Cumulative Duration Proposed: 2 years 19 weeks

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) is launching a Pilot Residential Green Infrastructure Grant Program and seeks to retain the services of a qualified Program Administrator to assist the SFPUC with the implementation of the Program. This new pilot Program will test new technologies on residential properties, encourage residential property owners to manage stormwater on-site, improve sewer collection system performance during wet weather, and educate San Franciscans on the collection system and stormwater management. This professional services contract will be used to fund a short-term, pilot-scale program to test a new grant administration structure and deliver a limited number of projects. The lessons learned from the results of this contract will contribute to future budgeting and staffing for the Residential Green Infrastructure Grant Program.

The Program Administrator will be responsible for program administration, financial management, property owner outreach and coordination, project management, and reporting for the installation of green stormwater infrastructure facilities on residential properties in San Francisco. The Program Administrator will conduct outreach to interested homeowners and recruit them to participate in the Program through workshops, outreach collateral, and site visits. The Program Administrator will assess residential properties and support homeowners in developing applications for grant funding. The Program Administrator will issue payments to homeowners for the cost of design and construction services to build green stormwater infrastructure projects on their properties. The Program Administrator will also provide customer service, collect and manage data, and submit monthly reports on Program performance to the SFPUC.

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

During large storm events, the City's sewer system can become overwhelmed, resulting in localized flooding and combined sewer discharges to the Pacific Ocean or San Francisco Bay. One tool that SFPUC uses to manage stormwater and its impacts on the City is green infrastructure, which is a set of engineered, sustainable stormwater management tools that slow down, clean, and route stormwater to keep it from overwhelming the City's sewer system. Because over half of the City's drainage area is located on private properties, the SFPUC's green infrastructure strategy includes offering incentives for property owners to build green infrastructure to manage stormwater on their properties. Engaging property owners is therefore critical to scaling up green infrastructure to manage stormwater in San Francisco. Currently, SFPUC offers two grant programs for stormwater management, however single-family residential properties are not eligible for either program. This pilot program will therefore lay the framework to fill a programmatic gap that remains on the residential scale by testing the technological feasibility of residential-scale green infrastructure projects on a limited number of pilot homes. Without this program, a gap will remain at the residential scale and SFPUC will not be able to incentivize stormwater management on residential properties.

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 44431 - 22/23

D. Will the contract(s) be renewed?

Yes

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

2. Reason(s) for the Request

- A. Display all that apply

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

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

Explain the qualifying circumstances:

The administration of the Pilot Residential Green Infrastructure Grant Program is a short term, one time pilot to test new technologies on residential properties. In addition, this professional services contract is funded by a limited budget of \$300,000 through an add-back funding and there is no future program funding source identified at this time. There is currently no future funding allocated for this program and the establishment of new civil service positions or classes is therefore not feasible at this time.

- B. Reason for the request for modification:

To true up dates to 2 years needed for contract

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Program Administrator must have proven expertise and extensive experience in grant program administration, financial management, invoicing and data tracking; community engagement and outreach; residential-scale construction oversight and project management; and/or knowledge of residential-scale green stormwater infrastructure technologies. The Program Administrator must have skills and experience in interacting with diverse communities, recruiting program participants, providing customer service, and creating and disseminating public outreach materials. The Program Administrator must have knowledge of San Francisco's neighborhoods and communities and proven strategies for engaging these communities.

B. Which, if any, civil service class(es) normally perform(s) this work? 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5601, Utility Analyst; 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 scope above cannot be performed by civil service staff because of the short-term, limited nature of this pilot program. There is currently no long-term allocated funding source for this program and the sole funding source is \$300,000 in add-back funding. Therefore SFPUC does not have budget to hire a new civil service employee to perform this work. Additionally, this pilot program has a limited duration with only 8 pilot projects expected to be delivered over the course of one to two years. Therefore this pilot program is not full-time work and is sporadic in nature.

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: Existing civil service classes could perform this work. However, as described above, the limited budget and short-term duration of this program makes it infeasible to hire a new civil service employee. Therefore a new civil service class is not needed to perform this work.

6. Additional Information

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

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The contractor will not be training city staff because this is a pilot program with a limited scope and no long-term funding for ongoing operations of the program.
- 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 01/05/23, the Department notified the following employee organizations of this PSC/RFP request:
SEIU Local 1021; 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: 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# 44431 - 22/23

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 02/06/2023

Receipt of Union Notification(s)

From: dhrr-psccordinator@sfgov.org on behalf of shale@sfgwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); max.porter@seiu1021.org; sarah.wilson@seiu1021.org; Sandeep.lal@seiu1021.me; leah.berlanga@seiu1021.org; najuawanda.daniels@seiu1021.org; jason.klumb@seiu1021.org; noah.frigault@sfgov.org; Julie.Meyers@sfgov.org; thomas.vitale@seiu1021.org; Ricardo.lopez@sfgov.org; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; david.canham@seiu1021.org; jtanner940@aol.com; junko.laxamana@sfgov.org; WendyWong26@yahoo.com; [wendywong26@yahoo.com](mailto>wendywong26@yahoo.com); tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; dhrr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 44431 - 22/23 - MODIFICATIONS
Date: Thursday, January 5, 2023 10:19:02 AM

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

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

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 \$0 for services for the period January 20, 2023 – March 15, 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/dhrrupal/node/19588>

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
jtanner940@aol.com david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org
xiumin.li@seiu1021.org davidmkersten@gmail.com ted.zarzecki@seiu1021.net
pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org
pcamarillo_seiu@sbcglobal.net Kbasconcillo@sfgwater.org
Ricardo.lopez@sfgov.org
thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org
jason.klumb@seiu1021.org najuawanda.daniels@seiu1021.org
leah.berlanga@seiu1021.org Sandeep.lal@seiu1021.me sarah.wilson@seiu1021.org
max.porter@seiu1021.org

From: [Kyger, Todd](#)
To: [Hale, Shawndrea \(PUC\)](#)
Subject: FW: PSC # 44431 - 22/23
Date: Tuesday, January 10, 2023 1:00:32 PM
Attachments: [image001.png](#)

fyi

Thanks, t

Todd Kyger
Project Labor Agreement Administrator, Infrastructure
Workforce & Economic Program Services
Cell: 415-308-0839
Pronouns: he, him, his
sfpsc.org | tkyger@sfwater.org

From: Kyger, Todd
Sent: Tuesday, January 10, 2023 1:00 PM
To: Max Porter <max.porter@seiu1021.org>
Cc: XiuMin Li <XiuMin.Li@seiu1021.org>
Subject: RE: PSC # 44431 - 22/23

Thank you, I wasn't aware. Appreciate the follow up and continued support. - t

Thanks, t

Todd Kyger
Project Labor Agreement Administrator, Infrastructure
Workforce & Economic Program Services
Cell: 415-308-0839
Pronouns: he, him, his
sfpsc.org | tkyger@sfwater.org

From: Max Porter <max.porter@seiu1021.org>
Sent: Tuesday, January 10, 2023 12:49 PM
To: Kyger, Todd <TKyger@sfwater.org>
Cc: XiuMin Li <XiuMin.Li@seiu1021.org>
Subject: Re: PSC # 44431 - 22/23

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.

Hi Todd,

I believe I confirmed our waiver in the DHR database as you requested last week. Do you need anything else from us?

Max Porter

Field Representative

SEIU Local 1021

350 Rhode Island St., Ste. 100, San Francisco, CA 94103

510-206-8641



Staff Up SF! <https://www.staffupsf.org>

Sign up to become a Union Member! Together We Rise Up! <http://bit.ly/SFMembershipForm>

Sign up for text alerts for updates from the union. <https://www.seiu1021.org/text-me>

From: Kyger, Todd <TKyger@sflower.org>
Sent: Tuesday, January 10, 2023 12:45 PM
To: Max Porter <max.porter@seiu1021.org>
Cc: XiuMin Li <XiuMin.Li@seiu1021.org>
Subject: FW: PSC # 44431 - 22/23

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.

Just following up. Thank you.

Thanks, t

Todd Kyger
Project Labor Agreement Administrator, Infrastructure
Workforce & Economic Program Services
Cell: 415-308-0839
Pronouns: he, him, his
sfpuc.org | tkyger@sflower.org

From: Kyger, Todd

Sent: Friday, January 6, 2023 1:09 PM

To: Timothy Mathews <tmathews@ifpte21.org>; max.porter@seiu1021.org

Cc: XiuMin Li <XiuMin.Li@seiu1021.org>; Hale, Shawndrea M. <SHale@sflower.org>

Subject: PSC # 44431 - 22/23

Dear Union Representatives,

PSC #44431-22/23 was previously reviewed by the unions and approved at the CSC on December 19th, 2022, however we need to update the total term (MOD 1 attached) before executing the pending agreement. **No other changes have been made to the form.** If you can kindly confirm your waiver of the review period for **PSC #44431-22/23 MOD 1** in the DHR database, we would appreciate it. Thank you and please feel free to contact me with any questions or concerns.

Thanks, t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

Workforce & Economic Program Services

Cell: 415-308-0839

Pronouns: he, him, his

sfpuc.org | tkyger@sflower.org

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: Program Administration

Funding Source: Add-back funding

PSC Duration: 1 year 13 weeks

PSC Amount: \$300,000

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) is launching a Pilot Residential Green Infrastructure Grant Program and seeks to retain the services of a qualified Program Administrator to assist the SFPUC with the implementation of the Program. This new pilot Program will test new technologies on residential properties, encourage residential property owners to manage stormwater on-site, improve sewer collection system performance during wet weather, and educate San Franciscans on the collection system and stormwater management. This professional services contract will be used to fund a short-term, pilot-scale program to test a new grant administration structure and deliver a limited number of projects. The lessons learned from the results of this contract will contribute to future budgeting and staffing for the Residential Green Infrastructure Grant Program.

The Program Administrator will be responsible for program administration, financial management, property owner outreach and coordination, project management, and reporting for the installation of green stormwater infrastructure facilities on residential properties in San Francisco. The Program Administrator will conduct outreach to interested homeowners and recruit them to participate in the Program through workshops, outreach collateral, and site visits. The Program Administrator will assess residential properties and support homeowners in developing applications for grant funding. The Program Administrator will issue payments to homeowners for the cost of design and construction services to build green stormwater infrastructure projects on their properties. The Program Administrator will also provide customer service, collect and manage data, and submit monthly reports on Program performance to the SFPUC.

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

During large storm events, the City's sewer system can become overwhelmed, resulting in localized flooding and combined sewer discharges to the Pacific Ocean or San Francisco Bay. One tool that SFPUC uses to manage stormwater and its impacts on the City is green infrastructure, which is a set of engineered, sustainable stormwater management tools that slow down, clean, and route stormwater to keep it from overwhelming the City's sewer system. Because over half of the City's drainage area is located on private properties, the SFPUC's green infrastructure strategy includes offering incentives for property owners to build green infrastructure to manage stormwater on their properties. Engaging property owners is therefore critical to scaling up green infrastructure to manage stormwater in San Francisco. Currently, SFPUC offers two grant programs for stormwater management, however single-family residential properties are not eligible for either program. This pilot program will therefore lay the framework to fill a programmatic gap that remains on the residential scale by testing the technological feasibility of residential-scale green infrastructure projects on a limited number of pilot homes. Without this program, a gap will remain at the residential scale and SFPUC will not be able to incentivize stormwater management on residential properties.

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

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

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

The administration of the Pilot Residential Green Infrastructure Grant Program is a short term, one time pilot to test new technologies on residential properties. In addition, this professional services contract is funded by a limited budget of \$300,000 through an add-back funding and there is no future program funding source identified at this time. There is currently no future funding allocated for this program and the establishment of new civil service positions or classes is therefore not feasible at this time.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Program Administrator must have proven expertise and extensive experience in grant program administration, financial management, invoicing and data tracking; community engagement and outreach; residential-scale construction oversight and project management; and/or knowledge of residential-scale green stormwater infrastructure technologies. The Program Administrator must have skills and experience in interacting with diverse communities, recruiting program participants, providing customer service, and creating and disseminating public outreach materials. The Program Administrator must have knowledge of San Francisco's neighborhoods and communities and proven strategies for engaging these communities.

B. Which, if any, civil service class(es) normally perform(s) this work? 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5601, Utility Analyst; 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?

The SFPUC currently does not have staff availability or budget allocated for new staffing required to administer this pilot program. This short-term program will delivery a limited number of pilot projects, with the sole funding source of \$300,000 in add-back funding. Therefore, SFPUC is unable to leverage any available resources within the city to deliver this pilot program. Staff evaluated the capacity of other City departments, including Public Works, Rec and Park, and SF Environment, and determined they do not have available resources or the required expertise to provide this scope.

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

A. Explain why civil service classes are not applicable.

The scope above cannot be performed by civil service staff because of the short-term, limited nature of this pilot program. There is currently no long-term allocated funding source for this program and the sole funding source is \$300,000 in add-back funding. Therefore SFPUC does not have budget to hire a new civil service employee to perform this work. Additionally, this pilot program has a limited duration with only 8 pilot projects expected to be delivered over the course of one to two years. Therefore this pilot program is not full-time work and is sporadic in nature.

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. Existing civil service classes could perform this work. However, as described above, the limited budget and short-term duration of this program makes it infeasible to hire a new civil service employee. Therefore a new civil service class is not needed to perform this work.

6. Additional Information

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

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

No. The contractor will not be training city staff because this is a pilot program with a limited scope and no long-term funding for ongoing operations of the program.

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; SEIU 1021 Miscellaneous; SEIU Local 1021

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

Name: 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# 44431 - 22/23

DHR Analysis/Recommendation:

action date: 12/19/2022

Commission Approval Required

Approved by Civil Service Commission

12/19/2022 DHR Approved for 12/19/2022