



London Breed
Mayor

Micki Callahan
Human Resources Director

Date: February 15, 2019

To: The Honorable Civil Service Commission

Through: Micki Callahan
Human Resources Director *Micki Callahan*

From: Cynthia Avakian, AIR
Marissa Bloom, ECN
Kate Howard, DHR
Amy Nuque, MTA
Lavena Holmes, PRT
Bill Irwin, PUC
Sean McFadden, REC
Henry Gong, SHF
Jacquie Hale, DPH
Jolie Gines, TIS
Alexander Burns, DPW

Subject: **Personal Services Contracts Approval Request**

This report contains nineteen (19) 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 to date:

Total of this Report	YTD Expedited Approvals FY2018-2019	Total for FY2018-2019
\$51,827,719	\$221,289,750	\$1,045,305,388

Table of Contents
PSC Submissions

Regular PSCs	Department	Page
49666-18/19	Airport Commission	1
42645-18/19	Economic and Workforce Development	5
45429-18/19	Human Resources	60
46105-18/19	Human Resources	70
48019-18/19	Municipal Transportation Agency	89
41712-18/19	Port	101
45798-18/19	Port	110
44486-18/19	Public Utilities Commission	115
40732-18/19	Recreation and Park Commission	120
44727-17/18	Sheriff	125
40844-18/19	Public Health	176
42517-18/19	Public Health	181
49622-18/19	Technology	186
 Modification PSCs		
30382-17/18	Economic and Workforce Development	192
43857-14/15	Public Works	201
47395-17/18	Public Utilities Commission	212
41501-14/15	Recreation and Park Commission	223
44918-13/14	Recreation and Park Commission	233
44536-18/19	Technology	243

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POSTING FOR

March 04, 2019

PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR**Commission Hearing Date**

2019-03-04

APPLY

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
49666 - 18/19	AIRPORT COMMISSION	\$500,000.00	San Francisco International Airport (SFO) requires the assistance of National Aeronautics and Space Administration (NASA) Ames Research Center (ARC) for the purpose of analyzing and modeling the causes of congestion on the airfield. Tasks require SFO and NASA ARC to conduct a data-driven analysis of airfield operations to identify, quantify and interpret the extent of potential inefficiencies that may limit the capacity of the Airport and result in avoidable delays.	February 4, 2019	June 30, 2024	REGULAR
42645 - 18/19	ECONOMIC AND WORKFORCE DEVELOPMENT	\$240,000.00	Contractor will assist with the implementation of Healthy Retail SF, a City ordinance-mandated technical assistance program designed to increase access to healthy, affordable food. Contractor will be the lead consultant, supporting small businesses with space design, produce consulting, equipment needs, physical improvements and related activities. Contractor will also assist with client identification, conduct assessments of businesses, help create an individual development plan (IDP), provide individualized technical support to business clients based on the IDP, help with tracking progress, and follow up with the client and modify the approach to best suit the client's needs. Contractor will provide direct and focused technical assistance, in individual and group settings if needed. Contractor will also provide equipment, materials, and supplies as outlined in the IDPs to the small businesses.	February 18, 2019	June 30, 2021	REGULAR
45429 - 18/19	HUMAN RESOURCES	\$130,000.00	Provide expert test development consultation for the Q060 Police Lieutenant and Q080 Police Captain selection processes and defend those selection processes against legal challenge as necessary.	May 1, 2019	December 31, 2022	REGULAR
46105 - 18/19	HUMAN RESOURCES	\$190,000.00	Provide expert test development consultation for the Q050 Police Sergeant selection process and defend that selection process against legal challenge as necessary.	October 1, 2019	December 31, 2022	REGULAR
48019 - 18/19	MUNICIPAL TRANSPORTATION AGENCY	\$350,000.00	The contractor will identify a suite of programs and services that will be most likely to significantly reduce SOV trips by SFMTA employees at all facilities. The contractor will assess existing conditions, conduct stakeholder outreach, develop strategy proposals and recommend operations and evaluations plans for implementing those strategies. Draft scope attached.	February 1, 2019	December 31, 2022	REGULAR
41712 - 18/19	PORT	\$1,500,000.00	The contractor shall provide all services, personnel, labor, materials, and equipment necessary to package, remove, transport, and dispose of hazardous waste from Port properties. Contractor shall also provide all services, personnel, labor, materials, and equipment necessary to salvage, transport, and dispose of sunken and abandoned marine vessels from waters within Port jurisdiction.	March 1, 2019	February 29, 2024	REGULAR
45798 - 18/19	PORT	\$1,000,000.00	The services that will be provided under this contract are the environmental review and analysis of the proposed amendments to updates the Port of San Francisco Waterfront Land Use Plan ("Project") and advice on the impact and implications.	February 1, 2019	January 31, 2023	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
44486 - 18/19	PUBLIC UTILITIES COMMISSION	\$2,100,000.00	The contractor works with ranchers and farmers to use biosolids as a fertilizer. The contractor secures all necessary permitting required for the use of biosolids as a fertilizer. Annual fees for permitting are paid by the contractor. The contractor manages the agronomic application of biosolids so that nitrogen added to fields does not exceed crop uptake needs. When sufficient biosolids have been added to a field to meet its nitrogen needs, the contractor moves the application operation to a new field. When moving to a new field, the contractor is responsible for coordinating with the trucking contractor for the transportation of biosolids to the new location. The contractor is responsible for ensuring the all county ordinances are followed during the course of operations at each field. This includes the posting of signs, flagging of buffer areas where biosolids are not to be applied, setting up a mobile weather station, a portable toilet and a washdown station for trucks. The contractor is responsible for the spreading and discing (incorporation) of the biosolids on each field. Co-ordination with the ranchers, farmers, and county is the responsibility of the contractor.	April 1, 2019	March 31, 2023	REGULAR
40732 - 18/19	RECREATION AND PARK COMMISSION	\$150,000.00	The Recreation and Park Department is seeking the services of a landscape architecture firm to develop a schematic design concept plan for Buena Vista Park that reflects the Capital Improvement plan, community needs and operation maintenance needs. Schematic design will consider the circulation and hardscape, erosion control and water management, and woodland management. The scope will include outreach and community engagement.	February 1, 2018	February 1, 2020	REGULAR
44727 - 17/18	SHERIFF	\$3,600,000.00	Services are needed to provide electronic home detention monitoring and case management services for inmates who qualify for home detention as an alternative to jail incarceration. Program participants wear electronic bracelets that communicate via radio frequency to land line telephone or via cellular transmission to a centralized system that monitors the participants. Services include adjunct case management to monitor inmates' attendance in outpatient substance abuse and/or mental health programs, and urinalysis tests to monitor sobriety.	May 1, 2019	April 30, 2024	REGULAR
40844 - 18/19	PUBLIC HEALTH	\$1,000,000.00	In order to modernize and improve responsiveness and user friendliness of the Department's websites, the contractor(s) will provide website design, Search Engine Optimization (SEO), administration, testing, training, and support services, which may also include development of website pages focused on e-commerce for the Department's Vital Records office (birth and death records).	January 1, 2019	December 31, 2022	REGULAR
42517 - 18/19	PUBLIC HEALTH	\$1,750,000.00	The contractor(s) will provide fully hosted, web-based software and its support to enable credentialing and privileging of medical services providers and employees for the Department of Public Health (DPH). Support will include project management, design, programming, testing, documentation, and system integration services.	February 1, 2019	January 31, 2024	REGULAR
49622 - 18/19	GENERAL SERVICES AGENCY - TECHNOLOGY	\$500,000.00	Vendor will install a Jail Management System (JMS) and to work with San Francisco Sheriff Department Information Technology Support Services Staff (ITSS) to configure a prototype of the Inmate Booking Module in JMS. This service shall include a subscription to use the JMS software in conjunction with the San Francisco Sheriff Department existing Microsoft Dynamic CRM licenses. The prototype would be used by San Francisco Sheriff Department in a non-production environment for the duration of the subscription (12 months) in order to confirm that Vendor's JMS will meet the jail management system needs of San Francisco Sheriff Department. The scope, assumptions, and costs presented in this SOW represent Vendor proprietary experience and knowledge.	April 1, 2019	March 31, 2021	REGULAR

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>A. Project Scope</p> <p>Vendor will work with San Francisco Sheriff Department to install Offender360 JMS and all technology components associated with the software in a non-production San Francisco Sheriff Department environment on their server hardware. Vendor will conduct a series of training workshops with San Francisco Sheriff Department Information Technology Staff to enable San Francisco Sheriff Department To make configuration changes to the standard JMS Booking module and develop a non-production prototype that meets the specific business requirements of San Francisco Sheriff Department for the booking process. Vendor will include in the services a 12 month subscription of the Offender360 JMS software to allow San Francisco Sheriff Department users to test the application in a non-production environment for up to 12 months. The result of this project will provide a prototype that will enable San Francisco Sheriff Department to validate and confirm that Offender360 will meet the jail management system needs of San Francisco Sheriff Department.</p>			

TOTAL AMOUNT \$13,010,000



Published on *Personal Services Request Database* (<http://apps.sfgov.org/dhrdrupal>)[Home >](#)**Posting For March 04, 2019****Proposed Modifications to Personal Services Contracts**

Commission Hearing Date

2019-03-04

APPLY

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
30382 - 17/18 - MODIFICATIONS	March 4, 2019	ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN	\$200,000	\$300,000	The Office of Economic and Workforce Development (OEWD) is seeking to contract with an individual or firm that can serve as the department's One-Stop Operator (OSO), a lead coordinator of services delivered to San Francisco's workforce system. The workforce system is designed to establish services for a variety of San Francisco jobseekers that include unskilled, semi-skilled and high skilled individuals. The OSO will play a leadership role in coordinating the four (4) core mandated partners - the California Employment Development Department (EDD), California Department of Rehabilitation (DOR), City College of San Francisco (CCSF) Career Technical Education and Adult Education programs, and the San Francisco Human Services Agency (HSA)/Temporary Assistance for Needy Families (TANF) programs - and ensuring that appropriate services are delivered to customers through the workforce system. The role includes establishing Memorandums of Understanding (MOU) with the core partners, providing training and technical assistance and facilitating the successful implementation of services. Additional responsibilities may be determined by OEWD or suggested by the OSO or service providers to fulfill the OSO's role of system coordination and quality assurance.	02/18/2019	06/30/2021	REGULAR
43857 - 14/15 - MODIFICATIONS	March 4, 2019	GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW	\$0	\$500,000	Provide specialized services in Acoustical engineering to support DPW design staff on an as-needed basis. The City intends to award two (2) contracts for \$250,000 each, and contract duration of two (2) years each.	07/01/2018	06/30/2022	REGULAR
47395 - 17/18 - MODIFICATIONS	March 4, 2019	PUBLIC UTILITIES COMMISSION -- PUC	\$11,500,000	\$19,500,000	The San Francisco Public Utilities Commission (SFPUC) intends to award a \$8 million agreement to support SFPUC civil, structural, electrical, process, mechanical engineering staff, and for other specialized engineering services needed to assist in the design and support during construction of a new raw water ozonation system at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues. Design scope includes new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical	10/01/2019	10/01/2026	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					<p>power facilities, associated piping/appurtenances, associated automatic controls (I&C), related facilities, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load. The Sunol valley power supply and usage will need to be analyzed and upgraded at San Antonio Pump Station and the Calaveras Substation to accommodate the new plant power loads. The contract will also address identified plant process limitations and make modifications to improve the plant reliability.</p> <p>Scope Change: The San Francisco Public Utilities Commission (SFPUC) intends to award a \$19.5 million agreement to support SFPUC civil, structural, electrical; process, mechanical, and other specialized engineering services in the design and support during construction of a new raw water ozonation system, flocculant aid polymer system, and various needed upgrades at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues and plant reliability. The scope also includes an upgrade to the Calaveras high voltage substation to accommodate increasing power needs brought on by the new ozonation system and solar panels at the SVWTP to offset the large ozonation power demand. Major plant upgrades include new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, backup power facilities, polymer mixing skids, polymer aging tanks, transfer pumps, polymer building, associated piping/appurtenances, and associated automatic controls (I&C).</p>			
41501 - 14/15 - MODIFICATIONS	March 4, 2019	RECREATION AND PARK COMMISSION -- REC	\$600,000	\$1,400,000	<p>The Recreation and Park Department(RPD) is seeking the services of engineering firms with marina and coastal engineering expertise that can deliver a Criteria Package for the waterside improvements to the Marina Yacht Harbor, East Harbor, which RPD intends will be performed under separate contract by a design-builder. This consultant shall be tasked with providing preliminary design services for marina, coastal and general civil engineering, and consulting support services during the design/build process. Landside improvement designs will be prepared by the City and County of San Francisco's Department of Public Works (DPW).</p>	01/01/2019	12/31/2021	REGULAR
44918 - 13/14 - MODIFICATIONS	March 4, 2019	RECREATION AND PARK COMMISSION -- REC	\$6,017,719	\$8,017,719	<p>Provide full Landscape Architectural, Architectural, Engineering, and Outreach services for the Portsmouth Square Renovation. This includes all services necessary for all phases of project delivery: conceptual design,</p>	02/10/2019	02/10/2024	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					schematic design, design development, complete construction documents for permitting, bid, construction administration, and closeout. Scope will also include facilitation of broad community and stakeholder outreach process in multiple languages. A/E firm shall also provide cost estimating services during the course of the project.			
44536 - 18/19 - MODIFICATIONS	March 4, 2019	GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS	\$20,500,000	\$30,000,000	The Department of Technology has projects underway in the areas of: upgrading Wide and Local Area Networks, migrating Telephony systems to the City's new Cisco Call Manager, and moving Departments to new office spaces. The Department of Technology will also begin a project to migrate approximately 15 separate Contact Centers to a unified Enterprise Contact Center system. The awarded Supplier will provide project services for the upgrade, move, and migration project areas utilizing following phased structure: 1) Discovery and Analysis, 2) Planning, 3) Upgrade/Migration, 4) Post Go-Live support and training for handoff to City staff. Supplemental services include reviewing current systems and environments, designing new networks and systems, developing migration plans, configuring, installing, and testing new systems, moving and installing networks in new locations, providing support and training City staff on how to maintain and operate new systems.	03/01/2019	12/31/2027	REGULAR

TOTAL AMOUNT \$38,817,719

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Analysis and Modeling of Airfield Congestion

Funding Source: Airport Operating Funds

PSC Amount: \$500,000

PSC Est. Start Date: 02/04/2019

PSC Est. End Date 06/30/2024

1. Description of Work

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

San Francisco International Airport (SFO) requires the assistance of National Aeronautics and Space Administration (NASA) Ames Research Center (ARC) for the purpose of analyzing and modeling the causes of congestion on the airfield. Tasks require SFO and NASA ARC to conduct a data-driven analysis of airfield operations to identify, quantify and interpret the extent of potential inefficiencies that may limit the capacity of the Airport and result in avoidable delays.

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

SFO is congested due to current airline traffic and continuing effect of weather delays. If these services are denied, SFO will experience less than favorable ratings that may impact revenues.

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

D. Will the contract(s) be renewed?

Yes, if there continues to be a need for such services in the future.

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

NASA's skilled aeronautical data analysts and simulation specialists are able to work with SFO to deliver an analytical model to reduce airfield congestion.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: NASA's skilled aeronautical data analysts and simulation specialists are able to work with SFO to deliver an analytical model to reduce airfield congestion.

B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1054, IS Business Analyst-Principal; 1070, IS Project Director;

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

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

None, since the City doesn't have Civil Service classes with extensive airfield congestion modeling experience.

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 since the City doesn't have classes with extensive airfield congestion modeling experience.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, not 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 training will be provided by NASA.

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

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

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

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

7. Union Notification: On 12/21/2018, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49666 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com
Sent: Friday, December 21, 2018 2:01 PM
To: Cynthia Avakian (AIR); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Cynthia Avakian (AIR); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 49666 - 18/19

RECEIPT for Union Notification for PSC 49666 - 18/19 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 49666 - 18/19 for \$500,000 for Initial Request services for the period 02/04/2019 – 06/30/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12354> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN

Dept. Code: ECN

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

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

Type of Service: Consulting - Healthy Retail SF

Funding Source: General Fund

PSC Duration: 2 years 18 weeks

PSC Amount: \$240,000

1. Description of Work

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

Contractor will assist with the implementation of Healthy Retail SF, a City ordinance-mandated technical assistance program designed to increase access to healthy, affordable food. Contractor will be the lead consultant, supporting small businesses with space design, produce consulting, equipment needs, physical improvements and related activities. Contractor will also assist with client identification, conduct assessments of businesses, help create an individual development plan (IDP), provide individualized technical support to business clients based on the IDP, help with tracking progress, and follow up with the client and modify the approach to best suit the client's needs. Contractor will provide direct and focused technical assistance, in individual and group settings if needed. Contractor will also provide equipment, materials, and supplies as outlined in the IDPs to the small businesses.

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

The Healthy Retail SF (HRSF) program is a crucial service to the mission of the Office of Economic and Workforce (OEWD) - Invest In Neighborhoods Business Technical Assistance programs. HRSF is mandated by a 2013 City ordinance (San Francisco Admin Code, No. 193-13) and OEWD is required to implement it, with funding coming from soda tax revenue. The Department utilizes a contractor to provide as-needed, specialized consulting services to merchants, a resource the Department would not be able to offer without the support of a qualified contractor. Denial of this request would hinder OEWD's ability to implement HRSF, a program greatly needed by small businesses, and a program that has proven to be doing well in increasing access to affordable healthy foods and increasing small business revenues. In addition, denial of this authorization would prevent OEWD from fulfilling current commitments to small businesses participating in the program and adding any new participants to the program.

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

Some of these services have been provided through agreements authorized under PSC #31212-15/16 (attached). PSC #31212-15/16 covers a broader set of design and technical assistance services (many of which are in line with this request), however, this request includes specialized consulting needs that are unique to the Healthy Retail SF program.

D. Will the contract(s) be renewed?

Unknown at this time.

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

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

This is a short-term project which requires specific skills.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor will need to have expertise and verifiable experience in the following activities, to include but not limited to: 1) Grocery and Specialty Store Design 2) Store and Retail Space Planning 3) Refrigeration and Grocery Store equipment knowledge, expertise, and ability to purchase 4) Ability to provide individual and group technical assistance and expert advice on grocery store operations to business owners with varying levels of capacity 5) Produce Merchandising and Pricing 6) Healthy Food Product Merchandising and Pricing

B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst; 1825, Prnpl Admin Analyst II; 5212, Engineer/Architect Principal;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, through City funding the contractor will provide metro shelving, refrigeration and point of sale units as an incentive to the business owners.

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

We have connected with other City Departments that may have specialized staff in this field, such as the Department of Public Health (a partner in the Healthy Retail SF initiative). At this time, no expert City staff are available to deliver these services.

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

A. Explain why civil service classes are not applicable.

This project is short-term, intermittent, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Because of the high level of specialized skills needed, it would not be practical to adopt a new civil service class to perform this work. OEWD's Invest in Neighborhoods team has a Senior Community Development Specialist I (9774) staffing the project as Project Manager.

6. Additional Information

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

No.

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

No. While the contractor will be advising Department staff on ways to improve the program, the primary focus will be on deploying resources directly to OEWD's small business clients. It is not practical to train employees on this specific knowledge and expertise.

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 01/03/2019, 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: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42645 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of marissa.bloom@sfgov.org
Sent: Thursday, January 03, 2019 5:32 PM
To: Bloom, Marissa (ECN); amakayan@ifpte21.org; Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Collins, Jenny (ECN); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42645 - 18/19

RECEIPT for Union Notification for PSC 42645 - 18/19 more than \$100k

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a request for a Personal Services Contract (PSC) 42645 - 18/19 for \$240,000 for Initial Request services for the period 02/18/2019 – 06/30/2021. 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/12399> 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)

*** PRESS RELEASE *** MAYOR MARK FARRELL AND SUPERVISOR
MALIA COHEN ANNOUNCE \$10 MILLION IN ANNUAL FUNDING TO
REDUCE HEALTH DISPARITIES

MayorsPressOffice, MYR (MYR)

Tue 5/29/2018 10:26 AM

Deleted Items

To: MayorsPressOffice, MYR (MYR) <mayorspressoffice@sfgov.org>;

📎 1 attachments (138 KB)

5.29.18 Soda Tax Health Funding.pdf;

FOR IMMEDIATE RELEASE:

Tuesday, May 29, 2018

Contact: Mayor's Office of Communications, 415-554-6131

*** PRESS RELEASE ***

**MAYOR MARK FARRELL AND SUPERVISOR MALIA COHEN
ANNOUNCE \$10 MILLION IN ANNUAL FUNDING TO REDUCE HEALTH
DISPARITIES**

Additional funding made possible from voter-approved soda tax revenue will address inequities in underserved communities

San Francisco, CA— Mayor Mark Farrell and Supervisor Malia Cohen today announced that the City will spend \$10 million annually in soda tax revenue to address health inequities, with a specific focus on improving outcomes among low-income communities and communities of color.

Historically, soda consumption has been higher in low-income communities, which subsequently have disproportionately high rates of obesity, heart disease and diabetes. The funding will support health education, physical activity and food access programs and campaigns to raise awareness about the consumption of sugary drinks.

“Whether encouraging more physical activity or promoting healthy eating campaigns, this budget will help provide solutions to the epidemics of obesity and heart disease in our underserved communities,” said Mayor Farrell. “This community-led effort will ensure that our youth and families have healthy and active programs to enjoy.”

“As the sponsor of this law, I am proud to stand with the community and uphold the promise of directing soda tax revenue towards reducing health disparities for people of color and working class people,” said Supervisor Malia Cohen. “These dollars will be invested in creative programming that decrease sugary drink consumption and increase water intake. Most importantly, those spending most on the tax will see a direct reinvestment in their communities towards health education and disease prevention.”

Of the \$10 million in additional annual funding, \$4.5 million will be administered as grants to community-based organizations serving low-income communities and communities of color, with a focus on preventive health measures. An additional \$2.5 million will be allocated through the San Francisco Unified School District (SFUSD)

to support efforts to improve food and water access, and oral health services in schools. This includes improved nutrition, student-led efforts to reduce soda consumption and the installation of water stations in the 23 remaining schools that do not have them.

"The San Francisco Unified School District is uniquely positioned to leverage its scale and role to prevent sugar sweetened beverage related diseases, such as obesity and Type 2 Diabetes, and to disrupt and reverse health inequities in our community," said SFUSD Superintendent Dr. Vincent Matthews. "The Sugar-Sweetened Beverage Tax revenue will increase our capacity to prepare students for learning and to practice healthy habits. As educators, we're committed to the overall wellbeing of our students. This tax revenue will allow us to expand access to nutritious meals made of quality ingredients and locally grown produce, install more water hydration stations in our schools, increase access to dental care, and establish robust nutrition education and student engagement programs to support healthy choices."

The funding will also support food security through healthy eating vouchers, to be administered by community-based organizations and faith-based organizations. In addition, the tax measure will also expand peer programming at HOPE SF housing sites in communities impacted by health disparities. It will also support the City's Peace Parks program, the successful Healthy Retail program and several oral health task forces across the city.

"Sugary beverages pose a major health risk because they increase the risk of chronic illnesses like diabetes, obesity and heart disease and cause tooth decay," said San Francisco Health Officer Dr. Tomas Aragon. "These products target consumers with promises of happiness that can't be kept. It is great that San Francisco will be able to support programs and services in health education, physical activity, food access and to raise awareness about the consumption of sugary drinks."

Mayor Farrell and Supervisor Cohen largely accepted the recommendations of the Sugary Drinks Distribution Tax Advisory Committee (SDDTAC) on a funding plan for the tax measure. The Committee began meeting in December 2017, and offered data-based recommendations regarding tax expenditures in April 2017.

The committee's recommendations focused on prevention and direct investments in communities that are the hardest hit by chronic disease and are often the target of marketing campaigns from the sugar-sweetened beverage industry. In addition to providing recommendations, the committee is also tasked with evaluating the effectiveness of the tax-funded programs.

"It's gratifying to see the result of many years of collective effort by UCSF, UC Berkeley, Stanford and SFPDPH scientists, SF policymakers and local health advocates," said Roberto Vargas, co-chair of the soda tax committee. "Mayor Farrell's budget proposal strongly supports the recommendations of the SDDTAC, supports evidence-based approaches, and lives up to San Francisco's commitment to reinvesting these dollars back into the communities most targeted by the soda industry, and most impacted by disease associated with consuming sugary drinks."

"I think this is a huge win," said Joi Jackson-Morgan, co-chair of the soda tax committee. "Sugary beverages have a significant impact on our community and now we're giving families the tools and support to invest in their health."

In 2016, more than 62 percent of San Francisco residents approved the Soda and Sugary Beverages Tax measure, which imposed a tax of one cent per ounce on the distribution of certain sugary beverages in the city.

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Request for Qualifications #210

City and County of San Francisco

Office of Economic and Workforce Development

for

Consulting Services for Economic and Workforce Development Projects



Request for Qualifications #210

Date of Issue: Friday, October 19, 2018

Deadline for Responses:

Thursday, November 15, 2018 by 5:00 PM

1 complete response package may be submitted via email to

oezd.procurement@sfgov.org

(Preferred Method)

OR

1 copy of the completed response package including all supplementary materials may be hand-delivered by the deadline or received by OEWD by mail by the deadline at the following address:

Office of Economic and Workforce Development

1 South Van Ness Avenue, 5th Floor

San Francisco, CA 94103

Attention: Contracts and Grants Director

HAND DELIVERY RECOMMENDED IF SUBMITTING HARD COPY

Table of Contents

A. Background1

B. Project Descriptions.....2

 Area 1. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan

 Area 2. Real Estate Analysis and Technical Assistance:

 Area 3. Community Benefit District/Business Improvement District

 Area 4. Architectural Services

 Area 5. Logo/Branding Design

 Area 6. Photography Services

 Area 7. Storefront and Corridor Vacancy Assessment and Feasibility Analysis

 Area 8. Commercial Building Assessment

 Area 9. Real Estate Case Management Services

 Area 10. Tenant Coordination/Program Management

 Area 11. Mission Commercial Space Broker Services and Business Attraction Services

 Area 12. Chinatown Vacancy Activation Pilot

 Area 13. Architectural and Interior Design Services for Healthy Retail SF Program

 Area 14. Small Business Services through the SBDC

 Area 15. Workforce Technical Assistance and Training

 Area 16. Workforce Policy Tracking and Analysis Planning and Designing Workforce Services

 Area 17. City Build As-Needed Training Consultants

 Area 18. Employment Training Panel (ETP) Technical Assistance and Management

 Area 19. Economic and Labor Market Analysis

 Area 20. Development Agreement SharePoint Tracking System

 Area 21. Technology Consultation

 Area 22. Stakeholder Engagement and Facilitation

 Area 23. Marketing, Branding, Collateral and Website Development

 Area 24. Fiscal Services

 Area 25. Legal Advice for Cannabis Equity Applicants

 Area 26. Small Business Needs Assessment

 Area 27. Nonprofit Capacity Building

C. RFQ Timeline3

D. Respondents’ Questions4

E. Scope of Work4

F. Minimum Qualifications and Preferred Qualifications35

G. Content of Response Package36

H. Supplemental Questions and Information38

I. Final Submission38

J. Final Selection39

K. General Information39

 Conditions of Proposal/Response Package.....39

 Cancellation40

 Extendibility of Procurement Justification.....40

 Late or Conditional Proposals40

 Awarding of the Contract(s) or Grant(s)40

 Appeals41

A. Background

The City and County of San Francisco's Office of Economic and Workforce Development (OEWD) supports the City's ongoing economic and cultural vitality through key programs focused on neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development. OEWD's goal is to work continually, across industries and programs, together with diverse community stakeholders, to make San Francisco a better place to live, work, visit and do business. OEWD seeks to support the economic and community vitality of the City and to create equitable pathways for good paying jobs so that all San Franciscans may fulfill their deepest aspirations and benefit from the economic prosperity of our City. Through this Request for Qualifications (RFQ), OEWD seeks to develop a list of qualified contractors to provide a variety of consulting services, with a focus on advancing equity and shared prosperity for all residents.

B. Project Descriptions

OEWD is seeking to develop a list of qualified contractors to provide a variety of consulting services as described in Section E of this document. Selections for future projects will be based on the competitive qualifications, experience, and hourly rate quoted in the proposals responding to this RFQ. After the pre-qualified list is established, one or more qualified contractors may be asked to provide further details, portfolios of work and additional price information based on the needs of specific projects. Interested parties may submit one response package for consideration under one or more Areas defined in Section E, Scope of Work, below, or interested parties may submit separate proposals for each Area of interest. **Please define clearly in the overview of your submission under what Area(s) the package should be reviewed.**

Below is an overview of the types of work being sought in this RFQ. Details on each Area can be found in the subsequent pages of this RFQ.

Area number	Title	Subsections/Categories
Area 1	Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	Yes; subsections a. through d.
Area 2	Real Estate Analysis and Technical Assistance	None
Area 3	Community Benefit District/Business Improvement District	None
Area 4	Architectural Services	None
Area 5	Logo/Branding Design	None

Area number	Title	Subsections/Categories
Area 6	Photography Services	None
Area 7	Storefront and Corridor Vacancy Assessment and Feasibility Analysis	Yes; subsections a. and b.
Area 8	Commercial Building Assessment	None
Area 9	Real Estate Case Management Services	None
Area 10	Tenant Coordination/Program Management	None
Area 11	Mission Commercial Space Broker Services and Business Attraction Services	None
Area 12	Chinatown Vacancy Activation Pilot	None
Area 13	Architectural and Interior Design Services for Healthy Retail SF Program	None
Area 14	Small Business Services through the SBDC	Yes; subsections a. through bb.
Area 15	Workforce Technical Assistance and Training	Yes; subsections a. through c.
Area 16	Workforce Policy Tracking and Analysis and Designing Workforce Solutions	None
Area 17	City Build As-Needed Training Consultants	None
Area 18	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 19	Economic and Labor Market Analysis	Yes; subsections a. through b.
Area 20	Development Agreement SharePoint Tracking System	None
Area 21	Technology Consultation	Yes; subsections a. through c.

Area number	Title	Subsections/Categories
Area 22	Stakeholder Engagement and Facilitation	Yes; subsections a. through d.
Area 23	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 24	Fiscal Services	None
Area 25	Legal Advice for Cannabis Equity Applicants	None
Area 26	Small Business Needs Assessment	None
Area 27	Nonprofit Capacity Building	Yes; subsections a. through q.

OEWD may fund contracts and/or grants under this RFQ with a variety of federal, state or local funding as appropriate, including, but not limited to: the Workforce Innovation and Opportunity Act (WIOA), Community Development Block Grant (CDBG), California Career Pathways Trust (CCPT) funds, American Apprenticeship Grants through the Department of Labor, and City general funds.

C. RFQ Timeline

RFQ Issued	Friday, October 19, 2018
Question submission period ends	Wednesday, October 31, 2018 at noon
Final questions and answers posted	Tuesday, November 6, 2018 by end of day
Proposals Due (no exceptions)	Thursday, November 15, 2018 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Thursday, November 29, 2018
Appeal Period Ends (no exceptions)	Five (5) calendar days after notification date

This RFQ will be in effect for two years from the date that notifications are sent to proposers. OEWD may use this RFQ to justify contracts/grants with a term start date within the two year timeframe and for any necessary amendments to those agreements. The term of any agreements (and their amendments) do not need to conclude within the two year timeframe. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #204 in Spring 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves

for the additional project areas outlined on the following pages or reapply under similar areas to extend their prequalified status. The list of prequalified firms created through RFQ 204 will be active until March 2019. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #207 in Fall 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves for the additional subsections outlined on the following pages or reapply under similar subsections to extend their prequalified status. The list of prequalified firms created through RFQ 207 will be active until October 2019.

Schedule may change if necessary.

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 210 specific page linked to <https://oewd.org/bid-opportunities/rfq-210> It is the proposer's responsibility to review all changes posted and adjust responses as needed.

D. Respondents' Questions

Respondents may request clarification or ask questions about this document by emailing oewd.procurement@sfgov.org through **October 31, 2018 at noon** (preferred method). Respondents may alternatively drop off written questions to the Office of Economic and Workforce Development, 1 South Van Ness Avenue 5th Floor, San Francisco, CA before the deadline noted above.

No phone or fax questions will be answered. A consolidated list of questions and answers will be posted to the RFQ 210 specific page linked to <https://oewd.org/bid-opportunities/rfq-210> no later than end of day **November 6, 2018**. Periodic posting of questions and answers may occur prior to that deadline. Proposers are responsible to review the website periodically and incorporate guidance as appropriate.

E. Scope of Work

OEWD seeks to develop a list of qualified consultants in the following areas:

1. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan

OEWD is seeking qualified consulting nonprofit and/or for profit firm(s) to: 1) conduct an assessment of department practices regarding racial equity, diversity and inclusion; 2) develop a framework that is built on the central pillars of racial equity, diversity and inclusion; 3) provide training and meeting facilitation on racial equity, diversity and inclusion, and create a plan for subsequent trainings; and 4) develop a Racial Equity Plan based on the framework and assist with implementing the plan across the department's units, programs, policies, and practices.

Activities under this section may include:

A. Assessment and Evaluation

- Survey and interview all OEWD staff or a diverse subset of staff to assess beliefs, attitudes and practices regarding racial equity;
- Provide a summary of data that protects the identity of individuals who participate;
- Assist in the assessment of components which should be included in a department-wide Racial Equity Plan that will be developed by OEWD's Government Alliance on Racial Equity (GARE) cohort; and
- Assist in the evaluation of OEWD's programs, policies and practices to optimize consistency with the Racial Equity Plan and its principles.

B. Plan Development

- Develop a framework built around racial equity, diversity and inclusion
- Develop a Racial Equity Plan based on the framework
 - Plan and program design will have an emphasis on staff development.

C. Training and Facilitation

- Develop and provide meeting facilitation and training to Racial Equity Working Group members;
- Utilize best practices in establishing a framework which ensures that racial equity, diversity, and inclusion are key values of the department, including developing a shared understanding of key terms and concepts;
- Provide racial equity training and facilitation at all-staff meetings;
- Facilitate the development of a shared vision for a more inclusive and equitable organizational culture; and
- Build staff and organizational capacity, skills and competencies and provide recommendations for developing programs, policies and practices that support and advance racial equity over time.

D. Implementation

- Provide and develop tools and assist in the operationalization of the tools in the Racial Equity Plan to increase inclusion and racial equity across OEWD's programs, policies, and practices.

Minimum Qualifications:

- Expertise with racial equity, diversity and inclusion focused program design and facilitation, organizational development, human resource management, and research and evaluation services.
- Familiarity with Economic and Workforce development principles and concepts.

Preferred Qualifications:

- Familiarity with the social, physical and economic infrastructure of San Francisco's low-income neighborhoods and communities of color.

Supplementary Questions and Requirements:

1. Provide a description of at least 2 similar or relevant projects completed in the last 5 years; include challenges, successes, and impacts of the projects.
2. Provide links to websites and/or attach relevant supplemental materials such as a final report on the effectiveness or impact of prior work experience that is relevant to this area.

2. Real Estate Analysis and Technical Assistance

OEWD seeks consultants to provide real estate analysis services for commercial and mixed-use projects, including real estate consulting to nonprofit organizations, owners of community assets, and community groups.

Activities under this section may include:

- Estimate development and operation and maintenance costs for proposed development projects or portions of mixed-use projects (i.e. commercial portion only)
- Review development proposals and business terms for complex real estate projects
- Assess feasibility of different development finance tools, organizational structures, and proposed tenants/uses
- Perform stakeholder research to inform the evaluation of a proposed development project, a potential partnership, a proposed tenant/user, a development financing tool or organizational structure's feasibility
- Facilitate partnership agreements with developers
- Facilitate financing agreements with funders

Minimum Qualifications:

- Experience planning or implementing complex mixed-use real estate projects with multiple partners
- Experience estimating costs, developing pro formas, implementing finance tools, and structuring partnerships
- Track record providing assistance or partnering with nonprofit community organizations and neighborhood stakeholders

Preferred Qualifications:

- Track record working in San Francisco neighborhoods on successful commercial and mixed-use projects
- Track record partnering with the City or other public agencies on real estate projects

Supplementary Questions and Requirements: No supplemental information or questions are required.

3. Community Benefit District/Business Improvement District

OEWD is seeking Community Benefit District/Business Improvement District (CBD/BID) program support services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. CBDs/BIDs strive to improve the overall quality of life in targeted commercial districts and mixed-use neighborhoods through a partnership between the City and local communities. OEWD offers programs that help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Development of legal documents for forming or renewing districts; including, but not limited to the Management District Plan and Engineer's Report
- Overall management of CBD/BID from renewal through a successful election
- Working with OEWD to determine the effectiveness of the CBD/BID program or individual CBDs/BIDs
- Strategic planning for the CBD/BID program or individuals CBDs/BIDs

Minimum Qualifications:

- A strong track record of forming and/or managing CBDs/BIDs in San Francisco and/or the State of California
- Previous experience in strategic planning

- Previous experience in reporting the impact and effectiveness of CBDs/BIDs or citywide related programs

Preferred Qualifications:

- Previous work in strategic planning for CBDs/BIDs
- Previous work in reporting the effectiveness of individual CBDs/BIDs and/or citywide related programs
- Registered Supplier with the City and County of San Francisco

Supplementary Questions and Requirements:

1. Provide a list of all CBDs/BIDs your organization formed in the City and County of San Francisco and/or the State of California
2. Provide links to websites or attach an example of a final strategic plan your organization completed on behalf of a CBD/BID
3. Provide links to websites or attach an example of a final report on the effectiveness or impact of individual CBDs/BIDs or on a citywide program.

4. Architectural Services

OEWD is seeking services from architects to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with small business owners and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Review historic information, reports, previous building permits and planning requirements for each project. Conduct field measurements and photographing existing conditions.
- Work with OEWD staff and applicant to develop a minimum of two conceptual designs for the improvements.
- Create design development and construction documents drawings. Coordinate revisions with OEWD staff, applicant and Department of Building Inspection (DBI).
- Obtain all required building permit approvals.
- Develop a scope of work for bidding; attend contractors' walk-through; provide assistance during the bidding phase including responding to questions from contractors.
- Review bids and assisting OEWD staff to provide recommendations on choosing lowest price qualified contractor.
- Provide construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answer questions from contractors and OEWD staff.
- Conduct final walk-through with OEWD staff, contractor and applicant upon project completion. Inspect the work for compliance with applicable City guidelines and signing the Certificate of Completion.

Minimum Qualifications:

- Five years verifiable experience providing architectural services to small business and/or building owners similar to the services noted in the application section(s) above
- Licensed architect with the State of California.

- Three commercial façade and/or tenant improvement projects completed in the past 5 years.
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
 - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible for a contract award. Please visit <http://sfgov.org/olse/prevailing-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

Preferred Qualifications:

- Experience working with small business owners unfamiliar with the design process

Supplementary Questions and Requirements: No supplemental information or questions are required.

5. Logo/Branding Design

OEWD is seeking services from branding designers to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with the applicant and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Research and evaluate the business concept, customer perception, and other brands in the field.
- Work with OEWD staff and applicant to develop a minimum of three conceptual designs for a visual identity that could include logos, color schemes, signage, and environmental graphics.
- Submit digital files of all designs and a visual identity guideline document for the business.
- Communicate with contractors to specify design and material.
- Providing before and after high quality photographs of the project.

Minimum Qualifications:

- Five years of verifiable experience and three commercial space branding projects completed within the past five years.
- Experience designing signage.

Supplementary Questions and Requirements: No supplemental information or questions are required.

6. Photography Services

OEWD is seeking photography services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Conduct and facilitate planning and conceptualization meeting with OEWD staff.
- Review program information, goals, past projects, and communications needs.
- Develop detailed production work plan including shoot times and travel needs.
- Take photos that highlight the work of programs and services to small businesses and commercial corridors.
- Obtain necessary releases from people and property owners included in the shoots.
- Present proof photos for selection by OEWD.
- Edit chosen photos for photo retouching and file conversion to attain the standard and quality required by OEWD.
- Deliver digital files of final images by method approved by OEWD.

Minimum Qualifications:

- Five years verifiable experience providing photography for events, real estate, non-profit, and/or commercial purposes.

Preferred Qualifications:

- Experience working with small business owners.
- Experience working in San Francisco neighborhoods and commercial corridors.

Supplementary Questions and Requirements: No supplemental information or questions are required.

7. Storefront and Corridor Vacancy Assessment and Feasibility Analysis

OEWD seeks economic consulting services to assess corridor and storefront vacancies to inform City engagement to activate commercial storefronts.

Activities under this section may include:

A. Storefront Vacancy Assessment and Feasibility Analysis (single storefront)

- Use observation and key informant interviews (i.e. broker, building manager or landlord) to determine why a space is vacant. The possible factors will be provided by OEWD as a template.

- Use observation and findings about the neighborhood, including adjacent and nearby businesses, to assess the feasibility of the proposed or projected type of business that would occupy the space.
- Write up summary, including list of business types with the highest likelihood for sustainable success, and activation recommendations.

B. Corridor Vacancy Assessment

- Use vacancy data and additional data and interviews to analyze a corridor's general conditions, its uses and makeup, existing building/use (sq. ft.) inventory, and vacancies, and determine whether it is a problem and whether it is an opportunity for government intervention to solve.

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- At least three years of experience conducting similar assessments surveying and researching
- Analyzed neighborhood and/or regional economic composition, industry clusters, or local factor conditions
- Performed quantitative or qualitative market research in neighborhoods
- Researched and analyzed real estate market conditions and trends, performed stakeholder interviews and research

Supplementary Questions and Requirements:

1. Please describe your understanding of what these assessments may include and for what purpose.

8. Commercial Building Assessment

OEWD is seeking commercial building assessment services to support a business attraction storefront activation program.

Activities under this section may include:

- Conducting site visits
- Determining infrastructure needs (mechanical, electrical, plumbing, accessibility, life safety compliance requirements, etc.) to bring the building up to date and to code to be marketable.
- Providing costs estimates of necessary improvements

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience inspecting and providing assessment of commercial real estate property in San Francisco to determine structural and building systems issues including at a minimum assessment of the building's exterior, electrical, plumbing, HVAC, systems and structural elements
- Experience providing construction cost estimates in San Francisco

Preferred Qualifications:

- Certified commercial property inspector with experience in San Francisco.

Supplementary Questions and Requirements:

1. Please provide an example of commercial building assessment that you have performed for a building in San Francisco.

9. Real Estate Case Management Services

OEWD seeks commercial real estate broker services to support a storefront activation and retention program.

Activities under this section may include:

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

Minimum Qualifications:

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

Preferred Qualifications:

- California licensed real estate broker

Supplementary Questions and Requirements:

1. Describe recruitment methods for attracting neighborhood serving businesses.
2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience in negotiating leases and drafting letters of intent
5. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
6. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
7. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

10. Tenant Coordination/Program Management

OEWD is seeking a project manager to provide direct real estate services and manage a program that coordinates and supports storefront activation services.

Activities under this section may include:

- Partner and work closely with City team and neighborhood stakeholders to identify neighborhood business retention and attraction efforts and priorities.
- Coordinate with OEWD to prioritize corridors and storefronts for activation and retention based on assessment reports
- Facilitate coordination with Community based organization partners, vacancy assessments, and real estate brokers.
- Conduct direct, proactive, iterative business outreach to businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco
- Provide real estate services and direct case management for up to 25 storefronts
 - Assist businesses in representing them, negotiating leases, and drafting letters of intent.
- Coordinate Tenant Pipeline
- Maintain and manage a pipeline of vacant commercial storefronts. Various sources exist to collect vacancy information, but maintaining and becoming familiar with key and important vacancies will be important to filling them.
- Coordinate within OEWD, other City agencies, and grantee organizations to share vacancies with their clients who are seeking new spaces
- Consider creating a new clearinghouse for temporary or “pop up” users of commercial space
- Assess prospective tenants in leveraging existing service providers
- Assist with Existing Business Retention efforts
- Manage a list of priority businesses for retention services.
- Leverage existing programs to remove leasing barriers and incentivize business owners and property owners to agree to lease terms.

Minimum Qualifications:

- Experience working with real estate, construction-related parties, including but not limited to architects, designers, landlords, brokers, contractors, small business tenants, and City permitting agencies, to fill a vacant storefront.
- Minimum 3 years in real estate experience working with small businesses.

Preferred Qualifications:

Building Assessments

- Certified commercial property inspector with experience in California.

Real Estate Services

- California licensed real estate broker
- Five or more years in real estate matching experience working with small businesses

Supplementary Questions and Requirements:

1. Describe a program or project you have managed that involves multiple stakeholders and involves real estate matters.

2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
5. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

11. Mission Commercial Space Broker Services and Business Attraction Services

OEWD is seeking proposals for a nonprofit or for profit organization to partner with OEWD to support commercial space broker services and business attraction in the Mission District with a focus on Mission Street and 24th Streets. The vision for the future of the Calle 24 Commercial Corridor is that it will be an economically vibrant community that is inclusive of diverse income households, businesses and institutions that preserve the cultural and historic integrity of the neighborhood commercial district. In addition Mission Action Plan 2020 produced by the Planning Department states that the goal for Economic Development strategies are to stem the loss of and promote community businesses that serve low to moderate income households.

OEWD recognizes that in order to realize this vision the work must be community-led with a strong private-public partnership. OEWD is seeking proposals to hire a consultant to conduct commercial space broker and business attraction services to ensure a viable pipeline of neighborhood serving businesses into existing and future storefront vacancies.

Please refer to referenced Mission strategies; in addition you may refer to Mission District Economic Development Reports links on our website: <https://oewd.org/reports-and-plans>

A strong proposal shall demonstrate:

- Knowledge of Mission Action Plan 2020 led by the Planning Department and Calle 24 Latino Cultural District economic development goals and priorities
- Knowledge of economic development activities in the Mission
- A supportive structure that will guide and support a consultant to conduct the work

The budget may reflect compensation for the consultant position as well as operational activities.

The scope of work for the grant recipient(s) in this program area may include (but is not limited to) the following activities:

- Manage a list of new viable businesses to fill existing and upcoming vacancies
- Develop and manage relationships with property owners, businesses and community partners that maintain a pipeline of businesses for vacancies
- Assist pipeline businesses in representing them, negotiating leases and formulating letters of intent
- Collect and report on real estate market trends and prices for the area
- Leverage resources to support business in securing location
- Assist existing businesses in lease review and negotiating leases
- Assist businesses in connecting with partners, so they can be an accessible place for the low to moderate income community
- Maintain communication and report to OEWD and partners

- Communicate activities, milestones, accomplishments and areas of concern or need for strengthening
- Ensure activities are aligned with Calle 24 Latino Cultural District and Mission Action Plan 2020 Economic Development priorities

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- List prior experience in order to be a qualified applicant.
- A track record of success working in the Mission neighborhood
- Bilingual capabilities English/Spanish

Preferred Qualifications:

- Experience partnering with businesses, nonprofits, residents and the City to implement cultural and/or economic development strategies.

Supplementary Questions and Requirements:

1. Describe recruitment methods for attracting neighborhood serving businesses.
2. Describe how you interpret broker services and business attraction services support Calle 24 Latino Cultural District and Mission Action Plan 2020 economic development goals.
3. Describe proposed indicators that will be used to show progress of services
4. Describe accomplishments and successes in supporting small businesses within the Mission District
5. Describe your experience in negotiating leases and drafting letters of intent
6. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
7. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
8. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in the Mission.

12. Chinatown Vacancy Activation Project

Proposals are being sought by OEWD from nonprofit organizations to address storefront vacancies in Chinatown by identifying storefront vacancy best practices; developing storefront activation strategies; and implementing individualized action plans. Strategies are intended to reduce commercial vacancies, recruit new businesses, enhance the marketing of vacant spaces, facilitate lease negotiations, assist with permitting processes, and generally improve the neighborhood vitality in the Chinatown commercial corridor.

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

- Developing tenant attraction strategies or storefront activation strategies that center around Chinatown's unique character, needs and challenges
- Including local stakeholders, merchant associations, and business and property owners in identifying and prioritizing needs and risks in action planning
- Implementing individualized action plans for vacant storefronts to attract tenants or program the space for temporary activations during tenant transition periods

- Managing a mini-grant program (two-thirds of budget) that provides legal and/or permitting assistance
- Utilizing linguistically- and culturally-appropriate tools and resources in association with developing strategies and implementing action plans

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco
- Experience developing corridor improvement strategies and implementing action plans
- Experience administering city-funded economic and/or workforce development programs
- Established relationships with local stakeholders, merchant associations, business and property owners

Preferred Qualifications:

- Qualified staff with knowledge of commercial leasing and business accounting

Supplementary Questions and Requirements:

1. What experience does your organization have developing corridor improvement strategies? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
2. What experience does your organization have administering City-funded economic and/or workforce development programs? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
3. Provide a list of local stakeholders, merchant associations, business and property owners with which your organization has established relationships.

13. Architectural and Interior Design Services for Healthy Retail SF Program

OEWD is seeking services from architects to be primary contact for the store operator for store reset/redesign activities. Architect would collaborate with OEWD and the San Francisco Department of Public Health (SFDPH) to ensure corner stores have the opportunity and support needed to provide healthier options such as fresh produce, low salt and sugar alternatives, etc. by initiating contact with the store operator to redesign stores through the Healthy Retail SF Program.

Activities under this section may include:

- Ensuring corner stores have the opportunity and support needed to provide healthier options in two main areas:
 - Physical Changes (i.e. equipment such as produce refrigeration, shelving)
 - Business Operations (i.e. securing loans, Point of Sale system support, providing trainings & other resources)
- Assessing potential stores interested in the program for viability

- Attending meetings with the business and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Reviewing historic information, reports, previous building permits and planning requirements for each project. Conducting field measurements and photographing existing conditions.
- Creating design development and construction documents drawings/schematics. Coordinating revisions with OEWD staff, business and Department of Building Inspection.
- Obtaining all required building permit approvals.
- Providing construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answering questions from contractors and OEWD staff.
- Creating or providing visual signage that promotes healthy products in participating stores
- Maintaining a comprehensive budget and work plan
- Coordinating store reset/redesign activities with members of the Healthy Retail SF Program team (OEWD, Consultants and others) to include:
 - Order/purchase all necessary equipment for store reset/redesign
 - Communicate necessary information between OEWD, Store Operator, and the community
 - Take pre/post reset/redesign photos
 - Planning and coordination of the schematic/reset planning meeting(s)
 - Schedule and coordinate meetings between the produce consultant, store owner and others to conduct trainings about produce maintenance and merchandising.
 - Help develop and monitor the activities of the Individual Development Plan (IDP), related to the Physical Environment of the store, including but not limited to:
 - Assist with planning of a launch/Grand Re-Opening Event
 - As needed, provide information to report cards and provide input into yearly IDPs
 - Monitor any additional physical requirements specifically identified in the IDP, such as ensuring participating store has proper electrical outlets, storage space, etc.
 - Assist the store operator in the ordering and sourcing of fruits and vegetables and the appropriate products based on customer surveys conducted in the participating stores' community.
- Coordinating and providing additional equipment, technical assistance and/or support (if appropriate) as part of participating stores' annual incentive

Minimum Qualifications:

- Experience with Architectural and Interior Design Services
- Providing before and after high quality photographs and measurements of the project
- Experience working with small market and corner store operators
- Ability to invoice monthly
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
 - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible

for a contract award. Please visit <http://sfgov.org/olse/prevaling-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

Preferred Qualifications:

- Providing construction administration service
- Design assistance to improve visual identity, commercial façades, and business interiors to help small businesses
- Providing technical assistance to City of San Francisco (City) staff members, and property and business owners

Supplementary Questions and Requirements:

1. Please provide examples of similar projects worked on and completed.
2. Outline the process to complete the project, steps taken to address challenges and how successes were celebrated.

14. Small Business Services through the Small Business Development Center (SBDC)

The San Francisco Small Business Development Center (SBDC), a program within OEWD, is seeking business consultants to provide business counseling and training services. Specifically, SBDC is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations:

- a. advertising, marketing, sales and branding
- b. commercial lease negotiations
- c. small business establishment and formation
- d. contracting
- e. customer creation and retention
- f. financial management and analysis
- g. franchising
- h. human resource management
- i. inventory management
- j. loan packaging
- k. product development
- l. profitability tactics
- m. social media management
- n. space planning and analysis
- o. visual merchandizing
- p. technology
- q. web and graphic design
- r. strategy
- s. accounting and bookkeeping
- t. business taxes
- u. government contracting
- v. importing/exporting
- w. financing/capital
- x. commercial real estate
- y. e-commerce
- z. grant writing

- aa. Industry specific expertise (i.e. manufacturing, restaurant, retail...etc.)
- bb. Produce handling and marketing

Activities under this section may include:

- Developing and conducting training programs for small businesses in 1:1 and/or group settings.
- Directing small business clients to appropriate business resources for their needs
- Coordinating and maintaining regular contact with OEWD staff and the SBDC director
- Developing individual service plans and scopes of work for clients
- Tracking and reporting on economic impact of the work being provided

Additional information for this Section:

- Services may be required to be provided in a variety of languages including Spanish, Tagalog, Traditional Chinese, and other languages as needed.
- Some services may be required to be provided in the evenings or on weekends to accommodate client needs.
- The SBDC has a standard \$70 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hours)

Minimum Qualifications:

- 3 years verifiable experience providing business consulting and training services to small business clients and a minimum of 10 small business clients consulted and/or trained

Supplementary Questions and Requirements: Please answer the following questions and provide samples of work as part of the response package.

1. Explain your ability to develop and conduct training programs.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
3. Describe your knowledge of appropriate business resources to which business owners would be directed.
4. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
5. Indicate the languages you speak and the proficiency with which you speak them:
 - a. Level 1 – Elementary proficiency
 - b. Level 2 – Limited working proficiency
 - c. Level 3 – Professional working proficiency
 - d. Level 4 – Full professional proficiency
 - e. Level 5 – Native or bilingual proficiency
6. Describe your rapport or approach with clients. How do you communicate effectively with entrepreneurs and engage the cooperation of business owners in the implementation process?
7. Describe your success in helping business clients accomplish specified goals.
8. What knowledge and experience do you possess for dealing with clients' technical problems and producing results of a desired level? Please provide specifics related to all Area 3, subareas a through bb for which you would like this application to be considered.

9. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
10. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour?
 - a. Yes
 - b. Yes for some but not all contracts (Please answer question below)
 - c. No (Please answer question below)
 - i. If you are not willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour, what is your blended hourly rate?

15. Workforce Technical Assistance and Training

OEWD seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming.

Activities under this section may include:

A. Workforce Development Program Design

Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed.

Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning assessments, apprenticeship, learning labs and learning networks, and innovation process strategies.

B. Training and Technical Assistance on Regulatory Compliance

Providing technical assistance and training to service providers on administrative compliance with the State and Federal fund sources with an emphasis on Workforce Innovation and Opportunity Act (WIOA) funds and appropriate activities

C. Training of Best Practices in Workforce Development

Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas:

- Implementing workforce development best practices
- Client customer service – motivational interviews and strength-based interviews
- Effective case management to enhance participant success
- Competency based assessments
- Retention best practices
- Strategies for effective job development and employer engagement
- Strategies to utilize external resources outside of workforce system to support clients
- Using Labor market Information (LMI) to best inform programming

- Common measures to identifying “job readiness” across workforce system
- Innovation to incentivizing participants to submitting required documentation (i.e. employment/education verification)
- Employment matching based on skills, interests and sustainable wage occupations
- Strategies for removing employment barriers

Additional Information for this Section:

Audience may be as large as 100 and from a variety of levels (direct staff, management and leadership) within OEWD-funded workforce system service providers.

Applicants should demonstrate in their response the following specifics in regards to capacity building and training around workforce development:

- A successful track record providing assistance to workforce community organizations
- Success in increasing capacity of community organizations and their staff
- A successful track record working with low-capacity organizations
- A successful track record on providing trainings on workforce best practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies
- Experience in developing and facilitating training curriculum around workforce development best practices

Minimum Qualifications:

- Minimum of 5 years verifiable experience providing similar services (capacity building and training of workforce best practices) as those noted in the application area.

Preferred Qualifications:

- Experience in providing similar services to workforce providers in San Francisco

Supplementary Questions and Requirements: Please answer the following questions and provide samples of work as part of the response package.

1. Please provide an example of capacity building efforts with low capacity organizations.
2. Please provide examples of trainings you provided around workforce best practices.
3. Please provide 2 letters of recommendation from workforce organizations for whom you have provided capacity building.

16. Workforce Policy Tracking and Analysis and Designing Workforce Solutions

OEWD seeks consultants to track policies developing at the Federal or State level that effect or could influence San Francisco’s Workforce System, particularly as it relates to changes in funding for Workforce Development; new initiatives within Workforce Development at the State or Federal level; changes in legislated hiring or other HR requirements impacting employers; new or different regulations impacting the hospitality, technology, construction, or healthcare industries; credentials and/or certifications being developed for new and emerging industries relevant to the San Francisco labor force; etc.

Activities under this section may include:

- Providing research on policy, funding, and legislative changes impacting Workforce Development on the Federal and State Level, particularly (but not exclusively) those of WIOA.
- Tracking proposed funding changes, program planning requirements, and workforce related regulations in key sectors that will assist San Francisco's workforce system manage local in a way that best serves job-seekers and employers.
- Conducting research on the value of certificate programs versus college degrees for growth sectors like technology and advanced manufacturing.
- Researching on best practices and models developed in peer cities designed to address poverty and high unemployment in cities with great wealth disparity.
- Creating recommendations for implementing workforce policies and suggest directives to guide local programming; simplify local directives and policies so they can be shared and implemented by local system workforce providers.
- Researching the impacts of Artificial Intelligence (A/I) and Robotics have on the workforce, and in particular industries, and what training needs to be in place for entry level positions in those sectors.
- Tracking the efforts of the newly formed American Workforce Policy Advisory Board.

Minimum Qualifications:

- Minimum of 5 years verifiable experience providing similar services (policy tracking and analysis) as those noted in the application area

Preferred Qualifications:

Applicants should demonstrate in their response the following specifics in regards to workforce development policy tracking and analysis:

- Demonstrated understanding of workforce development policy landscape at the State and Federal level
- Established expertise in labor market and industry-driven credentialing programs
- Verifiable experience in providing policy analysis, best practices, comparative analysis, etc. for workforce development policy and legislation at the local, state, or federal level
- A successful track record of quantitative and qualitative analysis of industry and occupational trends that predict changes in hiring and HR practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies

Supplementary Questions and Requirements: No supplemental information or questions are required.

17. City Build As-Needed Training Consultants

OEWD seeks consultants to provide technical assistance to help craft and implement construction training curricula for as-needed CityBuild special trainings, including project-specific trainings such as the 2017 and 2018 Chase Center Trainings.

Activities under this section may include:

- Working with OEWD and CityBuild staff to develop detailed curricula for construction training modules tailored to meet industry and project-specific needs
- Assisting OEWD and CityBuild in implementing the Multi-Craft Core Curriculum in as-needed trainings

- Coordinating with jointly-administered apprenticeship programs to match training curricula to meet direct entry and preferred entry requirements
- Delivering construction training services at CityBuild-specified sites in the City and County of San Francisco

Additional information for this Section: Applicants should demonstrate in their response the following specifics::

Applicants should demonstrate in their response the following specifics: a successful track record providing assistance to OEWD, CityBuild, or any other Workforce Investment Board-affiliated pre-apprenticeship program in the nine-county Bay Area; a successful track record working in San Francisco; and a successful track record training disadvantaged jobseekers for success in jointly-administered training programs.

Minimum Qualifications:

- 3 years verifiable experience providing similar services as those noted in the application area
- Experience in delivering the Multi-Craft Core Curriculum is highly desired, though not required

Supplementary Questions and Requirements: No supplemental information or questions are required.

18. Employment Training Panel (ETP) Technical Assistance and Management

OEWD is seeking consultants to assist the department with the administration of existing and future California State Employment Training Panel (ETP) grants.

Activities under this section may include:

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training.
- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.

- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.
- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their

Minimum Qualifications:

- 5 years verifiable experience in providing similar services as those noted in the application area above.
- Specific workforce development related experience is highly desirable.

Supplementary Questions and Requirements: No supplemental information or questions are required.

19. Economic and Labor Market Analysis

OEWD seeks consultants to provide Economic and Labor Market Analysis consulting.

Activities under this section may include:

A. Workforce Development

OEWD is seeking consultants to provide economic consulting for labor market analysis. Consultants in this service will help OEWD make informed plans, choices, and decisions for a variety of purposes, including informing business investment decision making, career planning and preparation, education and training offerings, job search opportunities, hiring strategies, and public workforce investments. Among other tasks, consultants may be asked to review and analyze labor market data in order to identify emerging sectors, understand the health of existing sectors, identify where workforce investments are warranted, and measure changes in sector health in areas receiving City workforce investments.

The requested services may include analysis of community workforce skills and capabilities, employment opportunities and projections, skills and competencies required, career lattices, and sector/industry specific career development opportunities. The consultant may analyze current workforce development practices and make recommendations for industry-specific programming. These services may have a local, state, or nationwide focus, and will be based on research, labor market analysis, and stakeholder engagement (City, education, labor, etc.).

The consultant may also perform statistical analysis of employee wage data within or across sectors, industries, or employers, employee wage data for disparities based on race/ethnicity, gender, and/or race and/or gender-based discrimination among employees within or across sectors, industries, or employers.

The consultant may produce relevant reports, charts, tables, and other data visualization products. Firms may be asked to evaluate proposed intervention strategies for OEWD based on labor market projections and existing or planned training practices.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, workforce development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

B. Economic Development

OEWD is seeking consultants to provide economic consulting for economic development. Consultants in this service area will help OEWD conduct economic development analyses of local and/or regional markets, including analysis of economic, real estate, and industry/sector factors.

The requested services may include economic development strategy development, business attraction and retention, neighborhood and/or regional economic composition and performance, surplus and leakage analysis, sector analysis, analysis of local factor conditions, and small business and neighborhood corridor best practices. These services may have a local, regional or nationwide focus, and will be based on research, analysis, and stakeholder engagement.

Among other tasks, consultants may be tasked with survey design and implementation, stakeholder engagement, performance measurement, and make recommendations for industry- or neighborhood-specific programming. The consultant may be tasked with program implementation or marketing. The consultant may be asked to produce relevant reports, charts, tables, and other data visualization products.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, economic development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic development strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

20. Development Agreement SharePoint Tracking System

OEWD seeks consultants to provide technical assistance to build a SharePoint-based centralized multi-agency Development Agreement (DA) Obligations Tracking System which would track requirements in these unique agreements so that the City can more easily monitor and track these obligations. DAs are legal agreements between the City and private entities approved by the Board of Supervisors. OEWD seeks to develop this singular, comprehensive system to house and organize the conditions, requirements and mitigations specified in DAs. To this end, OEWD seeks to develop a website to house approved agreements and a centralized database system embedded there for tracking and enforcing DAs. In order to be effective as a tool for monitoring and enforcing DAs, the

SharePoint system should include a database management system that has several characteristics. Specifically, the database should:

- Be easily and conveniently accessible to users in multiple departments;
- Be flexible and robust enough to accommodate the wide variety and complexity that exists among DA requirements;
- Have advanced features such as custom reporting and automation of certain tasks (e.g., email notification of deadlines and milestones); and
- Have security and access controls adequate to preserve the integrity of the data.

Activities under this section may include:

- Scoping meetings: Conduct one-on-one technical sessions with staff from OEWD and six to eight participating agencies to develop custom applications and functions/procedures for the purpose of interfacing with a centralized database for tracking and enforcing the conditions, requirements, mitigations, and obligations.
 - Building the tracking system: Working directly with an OEWD project manager, draft the system and make adjustments, as necessary. Assist with integration directly with FAMIS/FSP, Accela PPTS, mapping software, City Outlook Directory, and other applicable systems, as necessary, or indirectly through data exporting/importing. Create and adhere to a project schedule for building and launching this system.
- Roll-out: Launch the new DA Obligations Tracking System. Provide on-going support and development through beta-testing.
 - Designing maintenance protocols: Draft protocols for OEWD and other stakeholders to utilize after roll-out stage. Develop department-specific work flows for custom reporting and automation of tasks. Create security and access controls to allow for the adequate preservation of integrity of inputted data. Build document management capabilities to upload and retrieve relevant files.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record in organizing and facilitating multi-stakeholder projects
- Technical expertise needed for all aspects of building the DA Obligations Tracking System

Minimum Qualifications:

- Three years verifiable experience providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar SharePoint obligation-tracking systems/databases.

Supplementary Questions and Requirements: No supplemental information or questions are required.

21. Technology Consultation

OEWD seeks consultants to design, develop, and deploy computer solutions to reduce costs, increase access, and improve outcomes.

Activities under this section may include:

- A. As-needed Technology Consultation services including:
- Assisting with identifying, purchasing and implementing new systems or upgrades to current systems
 - Developing electronic forms and workflows to support process automation
 - Integrating data from other systems as necessary to support process automation and reporting
 - Analyzing of business practices and associated tracking mechanisms, to include identification of current-state efficiency gaps and future-state recommendations.
 - Data de-duplicating and clean-up.
 - Collecting, documenting, and confirming functional requirements.
 - Creating, customizing, deploying or providing recommendations on technical and procedural systems for improved information sharing.
 - Automating of core departmental processes.
 - Creating, customizing, deploying or providing recommendations on technology solutions to integrate and consolidate current OEWD systems.
 - Providing end-user training and creating guide materials related to improvements.
- B. Developing a cloud-based, interactive data management system to track workforce-related data, specific to the construction Industry. System includes a project management tool, and the ability to track worker demographics and employer information. The system should allow users to generate customizable reports to view all data points and its relationships, with ability to export raw data as Excel and PDF file formats.
- C. Improving and expanding job-matching technology for the workforce portfolio. Improve and expand existing Salesforce-based job matching tool focused on connecting pre-qualified job seekers with employment opportunities.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record partnering with the City or other public agencies; the City currently uses the following system as part of its business operations: PeopleSoft, MS Office, SharePoint, DocuSign, Tableau, ArcGIS, Adobe, Drupal

Minimum Qualifications:

- 5 years verifiable experience providing similar services with systems as those noted in the application area(s) above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

22. Stakeholder Engagement and Facilitation

OEWD is seeking consultants to provide stakeholder outreach, engagement, and facilitation services for external-facing events, as well as facilitation services (both internal and external) related to event planning, promotion, retreats, and day-of event support. Services include, but are not limited to managing engagement processes and data collection plans, reporting results and

recommendations, and managing collaboration and partnership between stakeholders and members of the public.

Activities under this section may include:

- A. Stakeholder Outreach Services. Firms prequalified for work in this Service Area may be requested to provide outreach services to stakeholders (e.g., staff, customers/users, community groups, Board of Supervisors, City commissions, general public). Services may include, but are not limited to, designing, producing, managing outreach tools and strategies, presenting, and providing technical assistance, such as:
- Designing, developing, and implementing multi-media promotion strategies
 - Electronic outreach (e.g., e-newsletters, project websites)
 - Social media (e.g., Facebook, Twitter, blogs, cell phone apps)
 - Print and other promotional material: (e.g., mailings, reports, posters, advertisements, signage, etc.)
 - On-the-ground community outreach (e.g., tabling at community events, attending community groups' meetings, door-to-door flyering)
 - Media relations (e.g., media advisories, TV/radio/billboard advertisements, ethnic news media outreach)
 - Development and distribution of press releases
 - Communication plans
 - Translation and interpretation for non-English speaking populations. If applicable, respondents should make sure to indicate in which language(s) they are able to offer outreach services.
- B. Stakeholder engagement, research, and analytical services. The purpose of these services is to collect, analyze, and use stakeholder input to inform city departmental planning, decision-making, and process improvement efforts. Services may include, but are not limited to, the following:
- Design, conduct, and manage data collection plans to collect input from stakeholders using data collection methods, such as:
 - Surveys (e.g., online, mail, phone, in-person)
 - Opinion polling (and other large, random sample, statistically significant surveying)
 - Focus groups: for the purpose of collecting input and ideas from stakeholders as well as capturing different opinions and necessary information.
 - Design, conduct, and manage data analysis plans to analyze stakeholder input:
 - Collect, compile, and transmit data into usable formats
 - Develop and execute data analysis using quantitative and qualitative methods
 - Create data analysis reports, including summary reports and detailed final reports, and display results in various formats, e.g., PowerPoint, interactive/web-friendly, etc.
 - Develop recommendations and implementation plans based on findings and analysis
 - Present findings and recommendations to staff, commissioners or elected officials
 - Design, conduct and manage secondary research and data analysis to support primary research methods and findings, e.g., literature review, contextual research, market research, GIS mapping, US census data analysis.

- Conducting interviews with targeted employers or industry groups to obtain information on how to best position marketing initiatives and communicate benefits to the business community.
 - Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- C. Facilitation services between stakeholders and/or to provide assistance at public-facing events. The purpose of this service is to encourage collaboration and partnership between stakeholders, large working groups, and members of the public. Services may include, but are not limited to, the following:
- Planning, coordinating, and managing meetings and workshops between stakeholders, including but not limited to:
 - Working groups; for the purpose of creating recommendations and identifying solutions around a subject area or issue.
 - Conducting Stakeholder strategic planning sessions
 - Designing, conducting, and managing stakeholder facilitation processes, including coordination, communication, strategic advising, consensus-building, and conflict resolution services.
 - Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- D. Facilitation of groups with a focus on retreats, focus groups, and working group conferences and/or large scale project management with an emphasis on event planning, promotion, and day-of support.

Activities under this section may include:

- Creating and presenting retreat plans, agenda and materials for Department, board, or commissions
- Facilitating capacity building workshops for workforce professionals and organizations
- Logistics planning and coordination
- Creating, presenting, tracking, and analyzing pre and post group survey materials
- Obtaining, analyzing and reporting on direct feedback from participants as well as setting effectiveness measurement systems to develop strategies for continual process improvement and improved efficiencies
- Summarizing proposed recommendations, including specifying measurable objectives, timeframes, and key personnel
- methods of implementing these recommendations, and ways to measure progress and provide updates
- Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.

Minimum Qualifications:

- Respondents must have experience working with municipalities (or similar government agencies) on stakeholder outreach, engagement, facilitation and/or related research and analysis.

Supplementary Questions and Requirements: No supplemental information or questions are required.

23. Marketing, Branding, Collateral and Website Development

OEWD is seeking consultants to assist with establishing consistent and effective messaging among OEWD's programs and initiatives.

Activities under this section may include:

- a. Analyzing stakeholders and how they affect messaging across all channels (website, print collateral, social media, etc.).
- b. Analyzing and providing recommendations about how, through messaging and information design, OEWD can create better access to OEWD services for San Francisco residents, including underserved populations. This may include strategy for creating print and web materials that are user/customer focused. Provide OEWD with manual of best practices on how to create user/customer centered content.
- c. Designing research and analysis to better understand our customers/clients, including current challenges and barriers, socioeconomic context, etc.
- d. Data visualization
- e. Creating, presenting, implementing, and analyzing the effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- f. Analyzing current web, digital, and/or paper collateral and recommendations for additional pieces to effectively market services to the public, other City departments, and community stakeholders.
- g. Branding strategy to better integrate OEWD messaging and design across all channels (print, digital, social media, etc.) This may include design of logos, collateral, style guidelines, and other support materials to market services to the public, other City departments, and community stakeholders.
- h. Photographing events, programs, clients, and service providers for print and online marketing
- i. Analyzing of stakeholders and how they affect messaging in all available media (website, print collateral, etc.).
- j. Creating, presenting, implementing, and analyzing effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- k. Creating, implementing, and potentially consolidating appropriate website(s) to market services to the public, other City departments, and community stakeholders.
- l. Designing and producing logos, collateral, and other support materials to market services to the public, other City departments, employers and community stakeholders.
- m. Developing a Content strategy and developing print and web materials that are user/customer focused. Provide OEWD with manual of best practices for creating user/customer centered content.
- n. Creating a unified OEWD Workforce Development brand and graphic system for collateral across print, digital and social medial channels.
- o. Conducting door-to-door outreach to disseminate information about OEWD
- p. Developing a Marketing and Branding Strategy Plan that includes:
 - o A Style & Marketing Guide (these could be two separate activities)
 - o Marketing Toolkit
 - o Strategy for outreach to employers, providers, job seekers and other stakeholders through print, digital and social media channels

Minimum Qualifications:

- Three years verifiable experience providing similar services as those noted in the application area.

Supplementary Questions and Requirements: No supplemental information or questions are required.

24. Fiscal Services

OEWD seeks consultants to assist OEWD directly, individual grantees, or other system service providers which the department deems in need of assistance with fiscal operations.

Activities under this section may include:

- Training and coaching staff and leadership to improve fiscal operations of the designated organization.
- Reviewing, analyzing and documenting current practices; updating policy and procedures as necessary.
- Reviewing monthly invoices from grantees against Federal, State, local or other applicable regulations to confirm funding is being spent according to appropriate requirements.
- Developing or revising fiscal policies and procedures for administration of federal workforce funds, local city grant dollars, or a combination of both.
- Developing or revising cost allocation plans and functional budgets in partnership with one or more nonprofit agencies receiving a variety of Federal, State and local funding.
- Technical development of administrative procedures and policies related to financial management, cost allocation and monitoring.
- Creation of financial reports and documents.
- Providing training to service providers on financial compliance with the Workforce Innovation and Opportunity Act (WIOA), H1B retraining funding or other regulated funds.
- Conducting financial compliance reviews of WIOA service providers.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and provide updates including specifying persons responsible, timeframes, and measurable objectives.

Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

25. Legal Advice for Cannabis Equity Applicants

OEWD is seeking consultants to provide legal advice to small businesses and individuals, regarding the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604).

OEWD seeks providers that demonstrate familiarity with the local, California, and federal laws and regulations and the knowledge, experience, and ability to provide one-on-one consultation, and to develop educational materials to clarify the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604). Providers should be prepared and able to provide legal advice, including updates on current legal and legislative

developments. That advice should cover, but should not necessarily be limited to, the following general categories: license and permitting, banking, compliance audits, zoning, and tax and compliance.

Providers who demonstrate the qualifications and capacities to provide the professional assistance will be placed on a qualified provider list. On an as-needed basis, OEWD will use the list to match technical assistance providers to eligible clients.

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience with success providing similar services to small businesses or individuals

Preferred Qualifications:

- Knowledge of San Francisco's neighborhoods and small business infrastructure
- Experience working in a government and/or non-profit setting interacting with the development and implementation of programs that serve disadvantaged clients.
- Experience providing legal advice to inexperienced small business owners seeking to enter heavily-regulated industries

Supplementary Questions and Requirements:

1. Please provide a description of your firm's qualifications, including an understanding of laws pertinent to the San Francisco Equity Program, and having an approach, contracts, and experience providing comparable services in the industry or a related industry
2. Describe your past and present experience providing legal advice and developing education materials in any of the areas listed above. Please identify all areas of expertise. Include experience and approach working with historically marginalized individuals with a complex range of needs. Specify if this experience is directly tied to the cannabis industry.
3. Please share two examples of similar projects worked on and completed. Provide the scope, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.
4. Provide an example of how you explained a complex situation so that your client or audience who are not familiar with the industry technical terms understood what you were explaining. Provide the background, complex situation/regulation, your approach and actions, clarifying language and tools, and the results.
5. Provide a list of staff and significant subcontractors that would work on this project, including their qualifications, relevant experience, roles and responsibilities, and other projects they will be working on during the proposed timeline, along with percentage of time committed;
6. Provide a cost estimate and blended rate per hour for each scope of work element; and
7. Provide at least two professional references that can verify your firm's past experience and outcomes.

26. Small Business Needs Assessment

OEWD is seeking consultants demonstrating successful experience in providing economic consulting services to conduct a small business needs assessment with updated data and conduct a deeper analysis that sheds light on the effectiveness of OEWD's services, investments and

programmatic impact on small businesses; and identifies gaps in services and needed investments for businesses and business districts.

The study will inform our strategy for local and federal funding and intra-agency coordination for small business support services. The questions we would like the study to address are:

- What is OEWD doing to support small businesses?
- What's working/not working?
- Are we serving the small business community needs?
- How should we programmatically implement the recommendations from OEWD's 2017 retail study related to the national changing face of retail and its impacts locally?
- What unique challenges are encountered by women-owned businesses, minority-owned businesses, and low-income business owners, and what can be done to help address these challenges?

The research study will use a mixed-methods approach to evaluate OEWD's small business programs. The method may include an analysis of public and proprietary data, survey, and focus groups. The data analysis should be conducted first and will help shape the survey questions and focus group sessions. Focus groups of diverse stakeholders who have both engaged and not engaged in City-sponsored programs will go deeper and fill in gaps where information is missing from the data and survey.

Activities under this section may include:

- Identification, mapping, and relationship of existing services to support small businesses and entrepreneurs at different stages of small business development from pre-startup to expansion and growth.
- Analysis of quantitative data collected and provided (service provider reporting, OpenSF public data, local and state revenue streams, and other sources), and recommendations on what we should collect in the future to conduct annual program and service evaluation.
- Stakeholder research/survey and statistical evaluation of the effectiveness of programs to serve small businesses and microenterprises (what do the numbers mean, how significant are they, and what do they imply about the ways the City could operate and improve?).
- Recommendations and opportunities to increase the efficiency, effectiveness, accessibility, and coordination of the programs funded and services provided with a focus on businesses that are owned by, employ, or serve low- to moderate- income persons.
- Inventory of effective tools other entities (i.e. Cities, States, Federal Government, Non-profits, etc.) are using to help address the unique challenges faced by women, minority, and low-wealth small business owners. Of these tools, what is OEWD actively using, and what should be adopted or enhanced?

The study should begin in January 2019. The completion of the study, including recommendations, should be done by August 2019 in time for the Community Development Block Grant (CDBG) Request for Proposals for FY2020-2025, which is anticipated for November 2019.

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco

- At least three years of experience must have been in conducting similar studies surveying and researching concerning small businesses.
- Experience may include, but is not limited to: research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations.
- Experience in one or more of the following topics:
 - Economic development strategy
 - Analyzed neighborhood and/or regional economic composition and performance, the structure and competitiveness of an industry or industry clusters, or local factor conditions, or
 - Conducted surplus and leakage analysis
 - Developed an economic strategy that included all of the following: sector analysis, analysis of local factor conditions, and research on best practices in areas that may include small business development, local hiring, and procurement policy
 - Performed quantitative or qualitative market research in neighborhoods to inform economic development strategy recommendations;
 - Performed follow-up activities to either (1) implement the recommended programs and strategies resulting from the tasks listed above, including but not limited to the development of marketing strategies
 - Economic research
 - Prepared and implemented survey or interview research designs concerning business and consumer behavior, or
 - Performed econometric analysis of statistical data related to urban policy issues.
- Fiscal analysis
 - Performed professional and technical analysis in analyzing and forming revenue forecasts at local and state levels. The sources of revenue streams may include property taxes, sales taxes, income taxes, bond issuance, or any other types of public financing mechanisms, or
 - Compiled and analyzed employment data at both macro and detailed industry levels and produced employment projections based on trend as well as statistical analysis.
- Small Business Program evaluation
 - Assessed and evaluated business assistance programs
 - Conducted impact evaluation
 - Performed stakeholder research that was used to inform the evaluation of a proposed business project or program.

Preferred Qualifications:

- Experience working with municipalities
- Experience working with similarly scoped study in the Bay Area in the last 5 years
- Staff (subcontractor staff) with diverse language and cultural competency

Supplementary Questions and Requirements:

1. Please share at least two examples of similar projects worked on and completed. Provide the scope, budget, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.

2. Describe your knowledge of challenges and opportunities for small businesses in San Francisco.
3. Describe research and sources of information to be used to support this project

27. Nonprofit Capacity Building

OEWD is seeking nonprofit organizational development consultants to guide organizational diagnostic assessments, provide business counseling and identify capacity-building resources including service providers and/or training services. Specifically, OEWD is seeking consultants with expertise in one or more of the following areas, as they relate to nonprofit capacity building:

- a. Organizational needs assessment & market analysis
- b. Strategy, vision & impact
- c. Leadership coaching
- d. Fund development & resource generation
- e. Board development
- f. Equity, diversity & cultural competence
- g. Staff recruiting, development and retention
- h. Financial planning, budgeting, oversight & operations
- i. Succession planning
- j. Risk assessment
- k. Organizational design & change management
- l. Mergers and strategic restructuring
- m. Evaluation and infrastructure for ongoing program & organizational assessment
- n. Volunteer management
- o. Technological infrastructure
- p. Nonprofit establishment and formation
- q. Industry specific expertise (i.e. economic development, workforce, arts, education...etc.)

Activities under this section may include:

- Guiding organizational leadership in a diagnostic assessment of organizational capacity
- Developing and implementing individualized capacity-building plans and scopes of work for nonprofit clients
- Directing nonprofit clients to training programs and service providers, assisting with evaluation of proposals
- Providing direct services to clients
- Tracking and reporting on impact of the work being provided

Additional information for this Section: The Business Development Division has a standard cap of \$150 hourly rate for consulting (firms with extensive and/or specialized experience may be paid more). Applicants should demonstrate in their response the following specifics:

Minimum Qualifications:

- 3 years verifiable experience providing coaching, business development, capacity building and/or training services to nonprofit clients and a minimum of 10 nonprofit clients directly assisted.

Supplementary Questions and Requirements: Please answer the following questions and provide samples of work as part of the response package.

1. Explain your ability to guide organizational diagnostic assessments and develop nonprofit capacity building plans.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
3. Describe your knowledge of appropriate nonprofit resources and service providers to which nonprofit boards and senior staff would be directed.
4. Indicate the languages you (or key staff) speak and the proficiency with which you speak them:
 - a. Level 1 – Elementary proficiency
 - b. Level 2 – Limited working proficiency
 - c. Level 3 – Professional working proficiency
 - d. Level 4 – Full professional proficiency
 - e. Level 5 – Native or bilingual proficiency
5. Describe your rapport or approach with clients. How do you communicate effectively with nonprofit organizations and engage the cooperation of board members and other key stakeholders in the implementation process?
6. Describe your success in helping nonprofit clients accomplish specified goals.
7. What knowledge and experience do you possess for dealing with clients' capacity challenges and producing results of a desired level? Please provide specifics related to all subareas a through q for which you would like this application to be considered.
8. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
9. Are you willing to be compensated at or under the Business Development Division's hourly rate cap of \$150 per hour?
 - a. Yes
 - b. Yes for some but not all contracts (Please answer question below)
 - c. No (Please answer question below)

What is your firm's blended hourly rate?

F. Minimum Qualifications and Preferred Qualifications

In order for an application to be considered responsive to this RFQ, the contractor must possess and address in their response the minimum qualifications as specified in Section E of this RFQ. The minimum qualifications are specific to each Area and are described in Section E of this RFQ. Meeting minimum qualifications for each Area of interest is required in order for the application to be considered responsive.

If any preferred qualifications are specified in Section E of this RFQ, please also address these preferred qualifications in your response if you meet the preferred qualification. Please note that meeting preferred qualifications (if any) is not required, but is desirable. Not all Program Areas in Section E include preferred qualifications.

G. Content of Response Package

Submissions in reply to this RFQ must be in the form of a "response package" containing the response and all required supporting information and documents. Respondents are required to provide all information requested below and to clearly address the minimum qualifications noted in Section E for each Area of interest. In your response, please indicate "N.A." if the statement is not applicable to you. Note that some Areas in Section E may require additional documents or answers to supplemental questions to be submitted as part of the response package. Additional questions and/or requirements, if any, are included in Section E by program area, under the subtitle "Supplementary Questions and Requirements".

This RFP includes a total of 27 different program areas. Applicants may respond to multiple program areas through one application package or applicants may submit separate application packets to address each program area under which your firm would like to be considered. **Please identify clearly in the cover letter which Area or Areas from Section E, Scope of Work, that the response package should be considered under.** If responding to an Area or Areas that have SubSections, please also be sure to indicate the Subsection(s) of interest from the list of Subsections.

Please refer to the table in Section B of this RFQ for a list of all of the different program areas included in this RFQ. This table also shows if the Area includes any Subsections.

UNEXPLAINED OMISSIONS IN THE RESPONSE PACKAGE MAY DISQUALIFY THE ENTIRE SUBMISSION PACKAGE FOR REVIEW.

Submission Requirements

Responders may pick between the two options below. Option 1 is the preferred method.

- 1) 1 complete response package may be submitted via email to oe wd.procurement@sfgov.org. The entire response packet should ideally be submitted as one file attachment. If items (portfolio pictures, etc.) are too large to combine into a single file, additional compressed files containing supplemental materials may be submitted. Response packet files must be either MSWord or PDF; picture files may be png or jpeg. (Preferred Submission Method)

OR

- 2) 1 hard copy of the complete response package may be submitted to:
Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Contracts and Grants Director, RFQ 210

All information in the response package must be presented in the following sequence:

1. Response cover letter with contact information, including an email address, for the respondent. Cover letter must identify and address the Area(s) under which the application should be considered. There are a total of 27 Areas in RFQ210. If responding to any of the following Areas, please be sure to indicate the Subsection(s) of interest since each of the Areas listed below have Subsections:
 - Area 1 (Developing and Implementing a Racial Equity, Diversity and Inclusion Plan),
 - Area 7 (Storefront and Corridor Vacancy Assessment and Feasibility Analysis),
 - Area 14 (Small Business Services through the SBDC),
 - Area 15 (Workforce Technical Assistance and Training),
 - Area 19 (Economic and Labor Market Analysis),
 - Area 21 (Technology Consultation),
 - Area 22 (Stakeholder Engagement and Facilitation),
 - Area 23 (Marketing, Branding, Collateral and Website Development), and
 - Area 27 (Nonprofit Capacity Building)
2. Resume(s) of your (or key staff) experience, education, and other factors relevant to the services described in this RFQ. Be sure to include information about work similar to this project, as well as any related completed projects, education, and training.
3. A statement listing all contracts (both public and private) relevant to services solicited that have been completed during the last five (5) years. The statement must also list any failure or refusal to complete a contract, including details and dates. The statement should include a description of challenges, successes, and impacts of the project(s).
4. A list containing at least 3 professional references who can verify the respondent's previous experience and outcomes. The list should include at a minimum: name of reference, title, company, phone number, address, and email address as well as relationship to the project. If letters of reference are submitted, current contact information for each reference is still required.
5. Provide a statement, written solely by the respondent, addressing the following items:
 - a. A list of staff that would work on this project, including their qualifications, relevant experience, and other projects they will be working on during the proposed timeline, along with percentage of time committed. Be sure to address all of the minimum qualifications listed in this RFQ.
 - b. An estimated cost per hour for providing the services listed in this RFQ.
 - c. Successful applicants must either be an approved City Supplier (previously "vendor") or be able to meet all City Supplier requirements and not be on the City, State or Federal Debarred or Suspended lists. Unless approved by OEWD, all applicants must be able to become an approved City supplier within ten days of notice of award. If an awardee is not able to become an approved Supplier within this timeframe, OEWD may rescind an award offer and negotiate with other high ranked approved suppliers so as not to delay important programming. Sub-contractors are not required to be City-approved Suppliers; only the lead organization or fiscal sponsor must be City-approved. More information on how to

- become a City bidder (initial step) and progress to a fully compliant and approved City Supplier (required prior to contracting) can be found at <https://sfcitypartner.sfgov.org/>
- d. Confirmation that the firm and respondent are not suspended, debarred or otherwise excluded from participation in federal or local assistance programs.
 6. A response document answering all supplemental questions applicable to the area(s) under which the applicant is applying.
 7. All additional addenda requested in the Supplemental Questions and Information section of this RFQ for the area(s) under which your firm is applying.
 8. Any relevant addenda which the respondent wishes to submit such as a portfolio including samples of prior work (if not required).

H. Supplemental Questions and Information

In addition to addressing the minimum qualifications above, respondents to certain areas within the RFQ must also answer a set of supplemental questions

I. Final Submission

As noted above, respondents may pick between the two options below for submitting a response packet

- 1) **Preferred Submission Method:** 1 complete response package may be submitted via email to owd.procurement@sfgov.org. The entire response packet should ideally be submitted as one file attachment. If items (portfolio pictures, etc.) are too large to combine into a single file, additional compressed folders containing supplemental materials may be submitted. Submission files must be either MSWord or PDF; picture files may be png or jpeg.

OR

- 2) **Alternative Method:** 1 hard copy of the complete response package may be submitted to:
Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Contracts and Grants Director, RFQ 210

If emailing the response package, you will receive an automated response to indicate that your submission was received. You will be responsible for ensuring that all required questions have been addressed and that all supplemental materials have been submitted on or before the deadline. The receive date and time will be established by the date/time assigned by the City email server. Early submission is highly encouraged.

Response package must be received in hand at the OEWD office located at 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103 no later than **5:00 PM, Thursday, November 15, 2018**. No exceptions.

Postmarks will not be accepted in lieu of this requirement. Submissions by fax will not be accepted. Respondents will be issued a receipt upon submission of a package. This receipt does not verify that the package accepted is correct, complete or meets the minimum qualifications. Upon review, OEWD will send announcement letters to all parties notifying them of their status. If hand delivering, applicants should allow adequate time for parking, locating the office, obtaining approval and a visitor's badge from security staff, and other possible delays.

If you need to cancel and resubmit your application, please resubmit an entire package with all supplemental materials. In the body of the email, please reference the original application, including submission date, time, and originating email address. All submissions, original or replacement, must be received by the deadline stated in the RFQ. No late submissions will be considered.

J. Final Selection

The selection process will include an initial screening of the responses based on the minimum qualifications. All qualified written responses will then be evaluated by OEWD staff. The Department has the option of conducting oral interviews as part of the evaluation process.

Receipt of a notification letter confirming the respondent met the minimum qualifications as set forth in the RFQ is not a promise to contract for services. Contractor(s) receiving prequalification letters may be subsequently contacted by the department to discuss specific opportunity(ies) that coincide with the respondent's qualifications when and if they arise.

As noted previously, proposers are not required to be fully approved City Suppliers in order to apply to this RFQ, however, OEWD can only contract for services with fully compliant and approved City Suppliers. Successful applicants must either be an approved City Supplier (previously "vendor") or be able to meet all City Supplier requirements and not be on the City, State or Federal Debarred or Suspended lists. Unless approved by OEWD, all applicants must be able to become an approved City Supplier within ten days of notice of award. In no instance can OEWD contract for services with an organization which has not completed all steps of the Supplier process as outlined at <https://sfcitypartner.sfgov.org/>. More information on how to become a City bidder (initial step) and progress to a fully compliant and approved City Supplier (required prior to contracting) can be found at <https://sfcitypartner.sfgov.org/>. It is the proposer's responsibility to complete all steps with the various City departments as outlined on the website noted.

If the Department opts to conduct interviews to assess respondents' ability to provide the services, the Department may elect to interview only the most qualified respondents (based on the minimum qualifications and supplemental materials submitted), if the number of responses is high.

The final selection of all contractors for projects, based upon the written response (and possibly an interview), will be made by the Director of OEWD.

K. General Information

Conditions of Proposal/Response Package

1. The proposal may not be altered in any way after submission.

Respondent agrees that the Proposal and all materials submitted in response to the City and County of San Francisco Request for Qualifications to provide Consulting Services for the Office of Economic and Workforce Development RFQ #210 become the property of the City, and may be returned only at the option of the City and at the Respondent's expense. All proposals submitted may be subject to the "Sunshine Ordinance" and copies provided to the public upon written request (except certain confidential financial information).

2. The contractor must comply with the City and County ordinances and contracting requirements. For more detailed information, see the Office of Contract Administration website at <http://sfgsa.org/index.aspx?page=359>. City contracting requirements include general liability,

- workers compensation, and auto insurance coverage, compliance with the equal benefits ordinance, and attainment of a current San Francisco business tax certificate among other items.
3. Though it is not a requirement that all respondents are currently approved Supplier of the City, respondents must become a compliant City supplier for OEWD to enter into a contract for services. This process can take a few weeks or several months; the timeline is often dependent on the complexity of the proposer's benefits package for employees. If proposer is not already an approved City Supplier, the process should be started immediately. Possession of a City Supplier number is not enough to be eligible for City contracts. Interested parties must also complete the business tax declaration (or exemption) process, confirmation of equal benefits status, and other steps outlined on <http://sfgsa.org/index.aspx?page=4762>. As of January 2012, all Suppliers are also required to accept electronic payments. More information on this requirement can be found at the link above.
 4. Respondent agrees that all costs incurred in developing this proposal are the Respondent's responsibility and at the Respondent's cost.
 5. Respondent understands and agrees that any proposal may be rejected if it is conditional, incomplete and/or deviates from the specifications contained in this City and County of San Francisco Request for Qualifications to provide Consulting Services for the Office of Economic and Workforce Development RFQ #210. Respondent further understands and agrees that the City's representatives have the right to reject any or all proposals or to waive deviations, which are immaterial to performance. Respondent understands and agrees that minor defects may be waived at the discretion of the City.

Cancellation

The procurement process for this RFQ or any of its component areas or modules may be delayed, suspended, or canceled if the City determines that such action is in the best interest of the City.

Extendibility of Procurement Justification

This RFQ procurement process, and the submissions received as a result of it, may be used to justify contract or grant funding decisions for other similar services and/or other funding that becomes available through OEWD or any other City Department.

Late or Conditional Proposals

1. Any proposal received at the office designated in this RFQ after the exact time specified for receipt will **not be considered**.

Respondents must allow adequate time for parking, locating the office, obtaining approval and a visitor's badge from security staff to deliver the proposal, and other possible delays.

2. Any proposal may be rejected if it is conditional, incomplete, or deviates from specifications stated in this RFQ. Minor deviations may be waived at the discretion of the City.

Awarding of the Contract(s) or Grant(s)

1. All respondents will be notified in writing of the results of the evaluation of their submitted package. Receipt of a notification letter confirming the respondent met the minimum qualifications as set forth in the RFQ is not a promise to contract for services.
2. The tentative award(s) may be conditioned on inclusion of changes/additional terms. Negotiations over specific terms and language may be required before submission to the Civil Service Commission for approval, if applicable.

3. If OEWD is unable to negotiate a satisfactory agreement with a qualifying respondent(s), OEWD may terminate negotiations with that respondent and proceed to negotiate with other qualified respondents. This process may be repeated until a satisfactory contractual agreement has been reached.
4. Final award of any contract(s) solicited under this RFQ may be subject to approval by the Civil Service Commission.
5. In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs/RFQs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.
6. OEWD may fund contracts and/or grants under this RFQ with a variety of federal, state or local funding as appropriate including, but not limited to, the Workforce Innovation and Opportunity Act (WIOA), Community Development Block Grant (CDBG), California Career Pathways Trust (CCPT) funds, American Apprenticeship Grants through the Department of Labor, and City general funds. Additional terms and conditions may be required by specific fund sources and will be disclosed to and negotiated with potential contractors/grantees during the funding phase of projects.

Appeals

1. Following the review and announcement of qualified bidders, the OEWD will accept appeals regarding the proposal process and selections of qualified contractors.
2. Appeals must be in writing and addressed to:
Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Contracts and Grants Director, RFQ 210
3. The reason for the appeal must include citation of law, rule, regulation or practice upon which the appeal is based.
4. Appeals must be received within 5 calendar days from the date of the notification letter or notice of non-selection.
5. If the City determines that a meeting with the respondent is necessary, such meeting will be scheduled within five (5) business days of the receipt of an appeal to review and attempt to resolve the appeal. If the City determines that a meeting with the respondent is not necessary, at a minimum, the respondent will receive a written response to the appeal within 10 business days of the submission of a timely appeal.
6. The decision of the Director of the Office of Economic and Workforce Development on all appeals is final and any affected parties will be notified in writing of the outcome.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENTDept. Code: ECNType of Request: Initial Modification of an existing PSC (PSC # 31212 - 15/16)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Consulting - SF Shines Facade & Tenant ImprovementsFunding Source: General FundPSC Original Approved Amount: \$100,000PSC Original Approved Duration: 04/01/16 - 06/30/18
(2 years 12 weeks)PSC Mod#1 Amount: \$800,000PSC Mod#1 Duration: 07/01/18-06/30/19 (1 year)PSC Cumulative Amount Proposed: \$900,000PSC Cumulative Duration Proposed: 3 years 12 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

In an effort to improve the City and County San Francisco's business corridors, contractors will provide design and technical assistance for the SF Shines program to property and business owners to improve commercial façades, business interiors and provide accessibility upgrades. Contractors will develop design concepts and permit drawings necessary to obtain building approvals with the departments of Planning, Building Inspection and the Mayor's Office on Disability. Contractors will assist in the bidding and construction of façade and tenant improvement projects.

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

The SF Shines program is one of the Mayor's Invest in Neighborhoods initiatives created to increase economic vitality along the City's diverse commercial corridors, attract new businesses, and provide support to existing businesses. The SF Shines program is the only program that provides direct physical improvements to commercial businesses in low income neighborhoods. The San Francisco Office of Economic and Workforce Development (OEWD) currently has over 20 projects in progress. If the service is denied, the program will be substantially compromised. Through this service, SF Shines will offer high quality design assistance to small business owners to implement designs that are consistent with the program goals and have the largest impact for the grant investment. This program results in increased City tax revenue by improving existing businesses in commercial corridors, removing barriers to accessibility, increasing neighborhood safety and encouraging investment in the City's diverse neighborhoods.

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 31212 - 15/16

D. Will the contract(s) be renewed?

Unknown at this time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:**2. Reason(s) for the Request**

A. Display all that apply

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

Explain the qualifying circumstances:

This is a short term project that requires special skills. Project types and duration vary greatly. SF Shines projects may include design of new signage, accessibility improvements, full façade redesign and tenant improvements for a variety of business types. Architects must have experience in commercial design including presenting and developing concepts to small business owners/building owners, obtaining building approvals and working with contractors.

B. Reason for the request for modification:

The Department identified additional resources to allocate to the program, which enables us to provide a more robust set of design services to a much larger pool of business customers. Additionally, extending the term by one (1) year.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractors must have experience in neighborhood revitalization through physical improvements for commercial corridors. The contractors must have skills in commercial façade and tenant improvements, signage and branding, facilitating and presenting designs to small business and building owners and city agencies, obtaining building and permit approvals, and working with general contractors and subcontractors.

B. Which, if any, civil service class(es) normally perform(s) this work? 5212, Engineer/Architect Principal; 5268, Architect;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This project is short term, intermittent, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This project is short term and the work is highly specialized. Having experience in commercial façade and tenant improvement design, neighborhood revitalization, facilitating, presenting and developing designs for small business owners/building owners, obtaining building approvals and working with contractors would not be practical for a new architect civil class.

6. Additional Information

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

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. Training employees by contractor is not necessary. The SF Shines program has a full time project manager who has experience working with architects on these types of projects. Contractors will attend a one-hour kick off meeting with the project manager to go over the SF Shines program guidelines and sample projects.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. **Union Notification:** On 03/21/16, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

Name: Kris Damalas Phone: 415-701-4870 Email: kristine.damalas@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31212 - 15/16

DHR Analysis/Recommendation:

05/02/2016

Commission Approval Required

Approved by Civil Service Commission

05/02/2016 DHR Approved for 05/02/2016

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES -- HRD

Dept. Code: HRD

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

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

Type of Service: Development and Administration of Q060 and Q080 Police Exams

Funding Source: General Fund and Work Order

PSC Amount: \$130,000

PSC Est. Start Date: 05/01/2019

PSC Est. End Date 12/31/2022

1. Description of Work

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

Provide expert test development consultation for the Q060 Police Lieutenant and Q080 Police Captain selection processes and defend those selection processes against legal challenge as necessary.

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

The service is necessary because Police Department selection processes have historically been litigious. The consultant will provide expert guidance and defend the City in the event of litigation.

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

Similar services were approved in 2015.

D. Will the contract(s) be renewed?

No.

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

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The City lacks staff with the credentials required to provide expert testimony in court.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must have extensive and current knowledge of psychometrics and statistical analysis, and experience providing depositions and testifying as an expert witness in State and Federal courts.

B. Which, if any, civil service class(es) normally perform(s) this work? 1241, Personnel Analyst; 1244, Senior Personnel Analyst; 1246, Principal Personnel Analyst; 0931, Manager III;

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?

DHR is unable to provide the services because staff do not have the level of expertise required.

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 staff do not have the credentials to provide expert testimony in court.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class because human resource analysts perform the majority of tasks related to development and administration of the selection process.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. There will be no formalized training. However, there will be a transfer of knowledge by working with 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 01/02/2019, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Municipal Executive Association

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

Name: Kate Howard Phone: 415-557-4944 Email: kate.howard@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45429 - 18/19

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of kate.howard@sfgov.org
Sent: Wednesday, January 02, 2019 9:05 AM
To: Howard, Kate (HRD); Christina@sfmea.com; staff@sfmea.com; Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Brusaca, Christina; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 45429 - 18/19

RECEIPT for Union Notification for PSC 45429 - 18/19 more than \$100k

The HUMAN RESOURCES -- HRD has submitted a request for a Personal Services Contract (PSC) 45429 - 18/19 for \$130,000 for Initial Request services for the period 05/01/2019 – 12/31/2022. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12372> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES -- HRD Dept. Code: HRD

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Development and Administration of Q-60 Promotional Examination

Funding Source: General Fund PSC Duration: 3 years 17 weeks
PSC Amount: \$99,000 PSC Est. Start Date: 03/01/2015 PSC Est. End Date: 06/30/2018

1. Description of Work

A. Scope of Work:

The consultant will oversee the development and administration of the Q-60 Police Lieutenant promotional exam and defend those selection processes against legal challenge as necessary.

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

Due to the litigious nature of Police exams, it is necessary to retain an expert who can successfully defend selection processes. Absent successful defense against legal challenge, the City and County of San Francisco would be unable to establish eligible lists and promote candidates.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
The services were approved September 18, 2009 via PSC#3025-09/10.

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

2. Union Notification: On 02/13/2015, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35951 - 14/15

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/25/2015

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
Experience developing valid and reliable selection instruments for public safety agencies in major metropolitan areas; experience successfully defending the selection process against legal challenge; knowledge of Statistical Program Social Science (SPSS) methods and Uniform Guidelines on Employee Selection Procedures (UGESP).

B. Which, if any, civil service class(es) normally perform(s) this work?
1241,1244,1246,

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:
Civil service classes are not applicable because the work is intermittent. Expert consultants have the educational background, work history and must maintain their reputation, which is critical in administering public safety exams.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No. The City currently maintains classifications of employees who perform generalist work that is similar.

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

YES NO

- A. Will the contractor directly supervise City and County employee?
- B. Will the contractor train City and County employee?
Contractor will provide four hours of training to DHR staff per year.
- 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 PSC contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 02/24/2015 BY:

Name: Brent Lewis Phone: 557-4944 Email: brent.lewis@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES -- HRD Dept. Code: HRD

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Q-80 Promotional Exam Test Development

Funding Source: General Fund PSC Duration: 2 years 41 weeks
PSC Amount: \$99,000 PSC Est. Start Date: 09/14/2015 PSC Est. End Date: 06/30/2018

1. Description of Work

A. Scope of Work:

The consultant will oversee the development and administration of the Q-80 Police Captain promotional exam and defend those selection processes against legal challenge as necessary.

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

Due to the litigious nature of Police exams, it is necessary to retain an expert who can successfully defend selection processes. Absent successful defense against legal challenge, the City and County of San Francisco would be unable to establish eligible lists and promote candidates.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
The services were approved November 18, 2011 via PSC#3038-11/12.

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

2. **Union Notification:** On 08/25/2015, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 33466 - 15/16

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 09/02/2015

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Experience developing valid and reliable selection instruments for public safety agencies in major metropolitan areas; experience successfully defending the selection process against legal challenge; knowledge of Statistical Program Social Science methods and Uniform Guidelines on Employee Selection Procedures.

B. Which, if any, civil service class(es) normally perform(s) this work?
1241,1244,1246,

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:

Civil service classes are not applicable because the work is intermittent. Expert consultants have the educational background, work history and must maintain their reputation, which is critical in administering and defending public safety exams.

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

No. The City currently maintains classifications of employees who perform generalist work that is similar.

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

YES NO

- | | | |
|---|-------------------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
Contractor will provide four hours of training to DHR staff per year. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 09/02/2015 BY:

Name: Brent Lewis Phone: 557-4944 Email: brent.lewis@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES -- HRD

Dept. Code: HRD

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

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

Type of Service: Development and Administration for Q050 Police Sergeant Exam

Funding Source: General Fund and Work Order

PSC Amount: \$190,000

PSC Est. Start Date: 10/01/2019

PSC Est. End Date 12/31/2022

1. Description of Work

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

Provide expert test development consultation for the Q050 Police Sergeant selection process and defend that selection process against legal challenge as necessary.

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

This service is necessary because Police Department selection processes have historically been litigious. The consultant will provide expert guidance and defend the City in the event of litigation.

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

A similar service was approved in 2015.

D. Will the contract(s) be renewed?

No.

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

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The City lacks staff with the credentials required to provide expert testimony in court.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must have extensive and current knowledge of psychometrics and statistical analysis, and experience providing depositions and testifying as an expert witness in State and Federal courts.

B. Which, if any, civil service class(es) normally perform(s) this work? 1241, Personnel Analyst; 1244, Senior Personnel Analyst; 1246, Principal Personnel Analyst; 0931, Manager III;

- 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?

DHR is unable to provide the services because staff do not have the level of expertise required.

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 staff do not have the credentials to provide expert testimony in court.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class because human resource analysts perform the majority of tasks related to development and administration of the selection process.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. There will be no formalized training. However, there will be a transfer of knowledge by working with the consultant.
- 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. Ergometrics currently has a contract that expires June 30, 2019.

**7. Union Notification: On 12/27/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Municipal Executive Association**

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

Name: Kate Howard Phone: 415-557-4944 Email: kate.howard@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46105 - 18/19

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of kate.howard@sfgov.org
Sent: Thursday, December 27, 2018 3:11 PM
To: Howard, Kate (HRD); Christina@sfmea.com; staff@sfmea.com; Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Brusaca, Christina; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 46105 - 18/19

RECEIPT for Union Notification for PSC 46105 - 18/19 more than \$100k

The HUMAN RESOURCES -- HRD has submitted a request for a Personal Services Contract (PSC) 46105 - 18/19 for \$190,000 for Initial Request services for the period 10/01/2019 – 12/31/2022. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12257> 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)

RFP for Q050 Q060 and Q080

10.01.2018

City and County of San Francisco
Micki Callahan
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

**REQUEST FOR PROPOSALS
DEVELOPMENT AND ADMINISTRATION OF EXAMS
FOR POLICE CLASSES: Q050, Q060, AND Q080
DHR-RFP#2018-13
CONTACT: Christina Brusaca at Christina.brusaca@sfgov.org**

Date issued: **Monday, October 1, 2018**

Deadline for RFP Questions: **Monday, October 15, 2018, 2:00 p.m. (PT)**

Proposal due: **Friday, October 26, 2018, 2:00 p.m. (PT)**

**Request for Proposals for Development and Administration of Exams
for Police Classes: Q050, Q060, and Q080**

TABLE OF CONTENTS

	<u>Page</u>
1. Introduction	3
2. Rank Specific Information	3
3. Test Center Specific Information	5
4. Scope of Services	5
5. Question and Answer Period	9
6. Submission Requirements	9
7. Estimated Contract Terms	9

Request for Proposals for Development and Administration of Exams for Police Classes: Q050, Q060, and Q080

1. Introduction

- 1.1.** The City and County of San Francisco Department of Human Resources (DHR) is issuing this request to suppliers prequalified under RFQ#DHR2017-02 for Development and Administration of Public Safety Promotional Examinations.
- 1.2.** DHR is requesting proposals from suppliers successful in exam projects for public safety positions. Exam projects will be for the Q050 Police Sergeant, Q060 Police Lieutenant, and Q080 Police Captain positions in the San Francisco Police Department. The timeline for each of the three projects is shown in chronological order of start date in the table below. Please note that the list adoption dates are tied to expiration of the current list, and are subject to delay only if the current list is extended.

1.3. Timeline

Activity	Rank		
	Q060	Q050	Q080
Job analysis	07.01 – 08.31.19	11.01 – 12.31.19	02.01 – 03.31.20
Job Announcement	09.02.19	01.01.20	04.01.20
Test Development	09.01- 12.15.19	01.01 – 04.19.20	04.01 – 06.30.20
Prep Guide Issue	11.15.19	03.20.20	06.01.20
Admin1	12.16.19	04.20.20	07.01.20
Ratings	01.05 – 01.12.20	05.10 – 05.16.20	07.19 – 07.25.20
Admin 2	N/A	07.06.20	N/A
Ratings	N/A	07.26 – 08.02.20	N/A
List Post	01.30.20	08.19.20	08.05.20
List adoption	02.05.20	08.26.20	08.12.20

2. Rank Specific Information

2.1. Q050 Police Sergeant

Under direction, as a sworn member of the San Francisco Police Department, the Q050 Sergeant's duties may include but are not limited to: supervising field incidents, crime scenes or special events; monitoring, directing, evaluating, coaching and training subordinate personnel; reviewing documents and preparing routine paperwork; interacting with SFPD members, other city departments and law enforcement agencies; performing routine law enforcement field operations and station keeper duties; serving arrest and search warrants; collecting and processing physical evidence; interacting with victims, witnesses, and suspects during investigations; follow-up investigation, case management, and prosecution. Note that in 2009 the Sergeant position began to absorb the duties of the Q035 Inspector class. The Q035 class will likely be phased out with the departure of the last incumbent in the class. For more detailed information on the position, see the full class specification at:

<https://www.jobapscloud.com/SF/specs/classspecdisplay.asp?ClassNumber=Q050>

There are approximately 1,000 Officers in the Police Department who could qualify to take the test, but only 553 applied for this selection process the last time it was posted in October 2016. That Q050 selection process consisted of a multiple-choice written test as a hurdle, and then a role play and a tactical exercise. Candidate responses for both the role play and the tactical exercise were recorded for later evaluation by three-person panels consisting of officers from jurisdictions other than San Francisco.

2.2. Q060 Police Lieutenant

The Lieutenant in the San Francisco Police Department is a mid-level position assigned to the Office of Operations, Office of Administration, or the Office of the Chief of Staff. Essential functions of the position include: directing and coordinating field operations, incident and events; managing, administering, and documenting station activities; conducting, coordinating, and documenting administrative investigations; training and evaluating personnel; analyzing and formulating operational plans and priorities; interacting with internal and external individuals, organizations, and departments; managing, coordinating, and evaluating investigative operations. Lieutenants routinely perform other law enforcement duties. For more detailed information on the position, see the full class specification at:

<https://www.jobapscloud.com/SF/specs/classspecdisplay.asp?ClassNumber=Q060>

There are approximately 500 Sergeants in the Police Department who could qualify to take the test; 200 applied for this selection process the last time it was posted in October 2016. That Q060 selection process consisted of an assessment center including six exercises administered over a two-day period. Candidate responses for all exercises were recorded for later evaluation by three-person panels consisting of officers from jurisdictions other than San Francisco.

2.3. Q080 Police Captain

The Captain in the San Francisco Police Department is a management level position assigned to Operations, Administrative Services or Chief of Staff Bureaus. Captains report directly to a Commander or Deputy Chief. Essential functions of the position include: Directing, supervising and monitoring personnel; training, evaluating and developing unit personnel; reviewing and processing documents/communications; analyzing procedures/information and developing plans; interacting with individuals other than unit personnel; and community policing. Captains routinely perform other law enforcement duties. For more detailed information on the position, see the full class specification at:

<https://www.jobapscloud.com/SF/specs/classspecdisplay.asp?ClassNumber=Q080>

There are approximately 100 Lieutenants in the Police Department who could qualify to take the test; 46 applied for this selection process the last time it was posted in August 2015. That Q080 selection process consisted of a written, in-basket type exercise, a role play staff meeting with two lieutenants, and a role play meeting with two "community" members. Actors were trained to play the roles. Candidate responses for all exercises were recorded for later evaluation by three-person panels consisting of officers from jurisdictions other than San Francisco.

3. Test Center Specific Information

The City and County of San Francisco leases approximately 11,000 square feet of meeting space specifically devoted to test administration. The Main Test Room can seat 200 candidates classroom style, two per 5' by 18" table. The computer lab has 28 work stations networked to a printer. There are 18 separate "interview" rooms. With advance notice, and depending upon availability, we also have access to a second space at the same property that seats 150 candidates classroom style.

4. Scope of Services

- 4.1.** The scope of services is divided into areas associated with job analysis, test development, administration, scoring, analysis, and documentation. A vendor is to:
- 4.1.1. Itemize its bids by deliverable broken out by rank with a sum total for each rank;
 - 4.1.2. Describe how it proposes to perform each deliverable;
 - 4.1.3. Provide a schedule by which it expects to accomplish the phase of work outlined in each deliverable;
 - 4.1.4. Specify the schedule by which the City shall make payment for the delivery of those services;
 - 4.1.5. Provide the complete schedule by which it plans to accomplish all of the deliverables for each rank upon which it bids.

4.2. Job Analysis

Vendor will conduct the job analysis. The scope and depth of the job analysis must meet the standards of a "thorough job analysis" as defined by court decision, and conform to the Standards for Education and Psychological Testing (American Psychological Association), the Principles for the Validation and Use of Personnel Selection Procedures (Division of Industrial and Organizational Psychology) and the Federal Uniform Guidelines on Employee Selection Procedures. DHR's responsibilities shall be limited to providing recent job analysis data such as task and KSA statements, identifying possible Subject Matter Experts (SMEs), scheduling SMEs and coordinating facility use for Vendor to meet with SMEs.

4.2.1. Job Analysis Deliverable

Vendor will prepare and submit a job analysis report which will cover: the methodology; a literature review; job observations, workshops and/or panel discussions; development and administration of job analysis questionnaires; dates and demographics of SMEs and support staff participating in job analysis meetings; job analysis results; etc.

4.3. Test Plan

The Vendor will devise the test plan based upon the job analysis data. Special attention in designing the test plan should be given to any literature review findings of valid selection instruments and “best practice” approaches that have been used elsewhere for comparable job positions that demonstrate minimal or no adverse impact against protected classes. If there is more than one selection procedure or more than one use of a selection procedure that are substantially equally valid for use in assessing the qualifications of police applicants, the Vendor shall consider the procedure and/or the use of the procedure that has the lesser adverse impact, unless doing so would be inconsistent with business necessity or the City’s resource limitations, time constraints and/or the maintenance of exam security.

Consideration may be given to combining different selection procedures if use of such a combination complies with the Uniform Guidelines on Employee Selection Procedures and will likely result in a significantly more valid procedure overall than a single procedure. Additional procedures should be demonstrated through professional literature to yield incremental validity.

4.3.1. Test Plan Deliverable

Vendor shall prepare a report of the Test Plan that documents its rationale for the preferred assessment mode(s). The plan will delineate recommended exam type(s) (e.g., work sample/simulation, multiple choice, oral, essay, behavioral consistency, etc.), the relationship/linkage of the testable elements to be measured to the job analysis, weighting of exam components/items and how the weighting was derived, sub-test proportions, difficulty level, scoring methodology, passing score criteria, etc. If the Vendor determines, after consultation with the City, that use of a valid procedure with less adverse impact would be inconsistent with business necessity, impracticable or prohibitively expensive for the City, it will document those reasons in the report as well.

The Vendor will meet with representatives from DHR and/or Police Department to discuss its test plan recommendations. The Vendor’s proposed test plan will be reviewed by DHR prior to its acceptance. DHR shall approve the exam components to be used to assess Police candidates after considering Vendor’s recommendations. DHR reserves the right to make changes to the test plan as necessary.

4.4. Test Material Deliverable 1

Vendor will develop or provide assessment material, stimulus material, etc., that will comprise all components of the exam process. This may require Vendor to work with SMEs. [DHR's responsibilities in this regard shall be limited to identifying possible SMEs for test and/or scoring key development, scheduling those SMEs, and coordinating facility use for Vendor to meet with SMEs.] Exam material will measure key worker characteristics / job requirements identified in the job analysis and test plan, and be representative of important aspects of successful job performance. Vendor will develop a sufficient number of alternate forms of exercises to adequately protect the integrity of test content across multiple test administrations dependent on the size of the applicant pool. The number and/or weighting of test items will be based on the job analysis findings and will be representative of these findings in the proper proportions. All answer keys to exam items will identify the source from which they were derived. For free-response test material (e.g., orals, essays, assessment center exercises), Vendor will document minimally acceptable response rating criteria and devise behaviorally-anchored rating scales to evaluate candidate responses.

Vendor will be responsible for printing and packaging all test related materials unless otherwise agreed to in advance. Vendor will secure all test materials in their possession during the printing and packaging process, as well as during storage and transportation of those test materials.

All test and scoring material will be reviewed by DHR prior to its acceptance for inclusion in the exam. DHR reserves the right to make changes to the exam as necessary

4.4.1. Test Material Deliverable 2

Vendor will prepare a report that describes all test development activities performed. It will include all information collected and prepared in association with the test development process as described above. For example, it will demonstrate how the test content and weighting of measurable test components are derived from the job analysis findings, and provide documentation supporting the scoring key, as appropriate. The report must conform to the requirements specified in the Federal Uniform Guidelines on Employee Selection.

4.5. Pre-Examination Materials Deliverable

Vendor will review and approve the job announcement, including eligibility requirements to take the exam. Vendor will make recommendations, as appropriate.

In conjunction with acceptance of the exam material by DHR, Vendor will develop or provide a "candidate orientation guide" for the purpose of informing candidates what they can expect during the testing process, to help candidates prepare for the exam, to identify KSAs or tasks that will be measured by the selection instrument(s), to provide study reference material, etc.

Vendor will prepare and provide any materials used to train exam proctors and/or raters, as well as test administration instructions for candidates and test administration staff.

4.6. Test Administration and Scoring

As appropriate, DHR will be responsible for identifying, securing and scheduling proctors and raters needed for test administration and scoring. Expenses associated with the use of these proctors and raters will be paid by DHR separate from this contract. Vendor will be responsible for expenses associated with additional proctors and/or raters beyond those identified as necessary by DHR.

Vendor will train proctors and raters, determine plan/schedule for test administration and be physically present to oversee the overall administration and scoring of the test component(s). [DHR shall schedule and notify candidates for all assembled examination components, as well as secure proctors and the test facility.] Non-written assessments will be digitally recorded.

4.6.1. Test Administration and Scoring Deliverable

Vendor will prepare a brief report on the test administration and scoring which will include the logistics of the test administration/ scoring, as well as any problems or issues associated with the test administration/scoring.

4.7. Score Analysis

From data provided by DHR (in .xlsx format), Vendor will compile and conduct all appropriate analyses (e.g., inter-rater reliability studies, analyses of candidate scores, including adverse impact analysis by age, sex, and ethnic group, measures of statistical significance, etc.) and recommend, as appropriate, passing scores to DHR. Vendor will provide DHR with an electronic spreadsheet (in .xlsx format) of candidates' ratings/scores by test component, as well as candidates' overall final rating. Statistical procedures should follow the methodological rigor of psychological testing.

4.7.1. Score Analysis Deliverable

Vendor will prepare and submit a report that incorporates and summarizes any and all analyses performed. The report must comport with industry standards and guidelines and include the name of the statistical test, a justification for using it

based on data normality, homoscedasticity, etc., and appropriate data reporting for the test. This may include test statistics, degrees of freedom, alpha level, tables, graphs, charts, etc.).

4.8. Progress Reports and Meetings Deliverable

Vendor will provide brief written, monthly status reports to DHR that will include a review of the work in progress, an outline of problems encountered and methods of solution and any necessary updates relative to timetables and schedules for upcoming deliverables.

Vendor shall review DHR-authored responses and/or respond to challenges on exam-related matters from candidates to the selection process.

Vendor also will make presentations, as needed, before the Civil Service Commission, arbitrators, courts and other authorities relevant to any phase of the selection process. Proposal must include hourly rate for providing such service, and any other related expenses [e.g., travel, lodging, etc.]

4.9. Validation Report Deliverable

Vendor will prepare and submit the Test Validation Report that incorporates the job analysis, all phases of test development, administration and scoring, statistical analysis, etc. The report must comport with industry standards and guidelines (e.g., SIOP's Principles for the Validation and Use of Personnel Selection Procedures, Federal Uniform Guidelines on Employee Selection Procedures, etc.).

5. Question and Answer Period

Proposers shall submit all questions concerning this proposal, scope of services or requirements in writing by email only during the Question and Answer Period, ending **Monday, October 15, 2018, 2:00 p.m. (PT)** and directed to: Christina.brusaca@sfgov.org. Proposers who fail to do so will waive all further rights to protest.

6. Submission Requirements

Proposals must be received by **Friday, October 26, 2018, 2:00 p.m. (PT)**. All files should be submitted in unprotected PDF or Microsoft Word format. Proposals must be submitted electronically via email to Christina.Brusaca@sfgov.org. Late submissions will not be considered. Please reference RFP#DHR2018-13.

7. Estimated Contract Terms

DHR plans to start contract negotiations in January 2019. The estimated cost and duration is subject to proposals and contract negotiations.

Similar PSC-Q060

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN RESOURCES -- HRD Dept. Code: HRD

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Development and Administration of Q-60 Promotional Examination

Funding Source: General Fund PSC Duration: 3 years 17 weeks

PSC Amount: \$99,000 PSC Est. Start Date: 03/01/2015 PSC Est. End Date: 06/30/2018

1. Description of Work

A. Scope of Work:

The consultant will oversee the development and administration of the Q-60 Police Lieutenant promotional exam and defend those selection processes against legal challenge as necessary.

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

Due to the litigious nature of Police exams, it is necessary to retain an expert who can successfully defend selection processes. Absent successful defense against legal challenge, the City and County of San Francisco would be unable to establish eligible lists and promote candidates.

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

The services were approved September 18, 2009 via PSC#3025-09/10.

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

2. Union Notification: On 02/13/2015, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35951 - 14/15

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/25/2015

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Experience developing valid and reliable selection instruments for public safety agencies in major metropolitan areas; experience successfully defending the selection process against legal challenge; knowledge of Statistical Program Social Science (SPSS) methods and Uniform Guidelines on Employee Selection Procedures (UGESP).

B. Which, if any, civil service class(es) normally perform(s) this work?
1241,1244,1246,

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:

Civil service classes are not applicable because the work is intermittent. Expert consultants have the educational background, work history and must maintain their reputation, which is critical in administering public safety exams.

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

No. The City currently maintains classifications of employees who perform generalist work that is similar.

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

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 02/24/2015 BY:

Name: Brent Lewis Phone: 557-4944 Email: brent.lewis@sfgov.org

Address: 1 South Van Ness Avenue, 4th Floor San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY – MTA

Dept. Code: MTA

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

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

Type of Service: Provide Transportation Demand Management Planning for SFMTA Facilities

Funding Source: General, Local, Local Sales Tax, Operating

PSC Amount: \$350,000

PSC Est. Start Date: 02/01/2019 PSC Est. End Date 12/31/2022

1. Description of Work

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

~~Contractor will identify a suite of programs and services that will be most likely to significantly reduce Single Occupancy Vehicle (SOV) trips by SFMTA employees at all facilities. "SOV" trips refer to trips taken by automobile, with only one person in the car; the SFMTA has a goal to reduce these "SOV" trips in favor of trips such as public transit, bicycling, walking, or carpooling which have a reduced impact on the environment and the transportation system. Contractor will assess existing conditions, conduct stakeholder outreach, develop strategy proposals and recommend operations and evaluations plans for implementing those strategies.~~

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

SFMTA employees report to 30 different facilities throughout the city, each of which has different transportation options. As the city's population and job density increases, it can be increasingly difficult for employees to get to their job sites, particularly at job sites with limited transit access or for employees with non-standard shifts. This service is necessary to ensure that SFMTA staff have access to various options for traveling to work other than driving alone.

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

N/A

D. Will the contract(s) be renewed?

No

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

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

This project is a large one-time effort of limited duration.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Experience developing Transportation Demand Management strategies including conducting outreach and developing operation and evaluations plans.

B. Which, if any, civil service class(es) normally perform(s) this work? 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV;

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

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

NA. This project is a large one-time effort of limited duration.

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

A. Explain why civil service classes are not applicable.

N/A – Classes are applicable however insufficient project duration to hire new staff.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. N/A – Existing civil service classes would be able 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.
No. No training of CCSF employees is included in the RFP.

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. Unknown – we will be using a Request for Proposals (RFP) process to select a contractor so the contractor is not yet known.

7. Union Notification: On 01/14/2019, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48019 - 18/19

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-pscordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Monday, January 14, 2019 9:41 AM
To: Nuque, Amy; ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Nuque, Amy; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

RECEIPT for Union Notification for PSC 48019 - 18/19 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 48019 - 18/19 for \$350,000 for Initial Request services for the period 02/01/2019 – 12/31/2022. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12185> 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

Nuque, Amy

From: Timothy Mathews <tmathews@ifpte21.org>
Sent: Friday, February 01, 2019 12:35 PM
To: Sorell, Miriam; PSCsCoordinator
Cc: Ken Page; Debra Grabelle
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

EXT

✖ Hmm, yeah, I waived last week.

Just went in, and re-submitted waiver for 48019 - 18/19.

Timothy Mathews
Research Specialist

IFPTE Local 21
1167 Mission Street, 2nd Floor
San Francisco, CA 94103

Office: 415-914-7345

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

From: Sorell, Miriam <Miriam.Sorell@sfmta.com>
Sent: Friday, February 1, 2019 11:52 AM
To: Timothy Mathews <tmathews@ifpte21.org>; PSCsCoordinator <PSCsCoordinator@sfmta.com>
Cc: Ken Page <kpage@ifpte21.org>; Debra Grabelle <debra.grabelle@ifpte21.org>
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

Hi Timothy - I see that Amy's email from this morning didn't show the thread below in which you observed that you'd gotten them mixed up. Have you had a chance to log in and waive the waiting period yet?

Thanks so much!

Miriam

Miriam Sorell
Pronouns: she/her/hers
San Francisco Municipal Transportation Agency
Phone: 415.646.2412

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

From: Sorell, Miriam
Sent: Tuesday, January 29, 2019 3:21 PM

To: 'Timothy Mathews' <tmathews@ifpte21.org>; PSCsCoordinator <PSCsCoordinator@sfmta.com>
Cc: Ken Page <kpage@ifpte21.org>; Debra Grabelle <debra.grabelle@ifpte21.org>
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

That's great, news, thanks for letting us know!

Miriam Sorell
Pronouns: she/her/hers
San Francisco Municipal Transportation Agency
Phone: 415.646.2412

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

From: Timothy Mathews [mailto:tmathews@ifpte21.org]
Sent: Tuesday, January 29, 2019 2:40 PM
To: Sorell, Miriam <Miriam.Sorell@sfmta.com>; PSCsCoordinator <PSCsCoordinator@sfmta.com>
Cc: Ken Page <kpage@ifpte21.org>; Debra Grabelle <debra.grabelle@ifpte21.org>
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

EXT

I'm sorry - I got this PSC email chain crossed with another (# 48639).

This one is okay. I will log-in and waive, given the only alteration was title change.

-Timothy

Timothy Mathews
Research Specialist

IFPTE Local 21
1167 Mission Street, 2nd Floor
San Francisco, CA 94103

Office: 415-914-7345

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

From: Sorell, Miriam <Miriam.Sorell@sfmta.com>
Sent: Tuesday, January 29, 2019 2:27 PM
To: Timothy Mathews <tmathews@ifpte21.org>; PSCsCoordinator <PSCsCoordinator@sfmta.com>
Cc: Ken Page <kpage@ifpte21.org>; Debra Grabelle <debra.grabelle@ifpte21.org>
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 48019 - 18/19

Hi Timothy -

Additional Attachment(s)

ACRONYMS

- Bay Area Rapid Transit (BART)
- High Occupancy Vehicle (HOV)
- Parking Control Officers (PCOs)
- Request for Proposals (RFP)

- San Francisco Municipal Transportation Agency (SFMTA)
- Single Occupancy Vehicle (SOV)
- Transportation Demand Management (TDM)

SFMTA Facilities Transportation Demand Management (TDM) Scope for Request for Proposals (RFP)

Background

In 1973, San Francisco passed a "Transit First" policy, and the city has continued to prioritize public transportation, walking, and bicycling when determining how to best use limited street space and public thoroughfares. Voters have repeatedly supported an integrated approach that emphasizes sustainable modes. In 2014, San Francisco voters passed two funding measures that improve public transit and build safer streets in neighborhoods citywide. More recently, in 2016, San Francisco voters reasserted their trust in transportation officials by voting down another ballot measure, depoliticizing the work of the San Francisco Municipal Transportation Agency (SFMTA). Time and time again, San Francisco voters have reaffirmed the city's transportation planning direction and supported environmentally-superior transportation options.

People who travel in San Francisco know that the city's roads, bridges, and transit lines can be congested and sometimes struggle to operate effectively when they are over capacity. The city is in the midst of another era of high population growth and development. The city's population is expected to grow by 280,000 people and add 100,000 new households by 2040. Additionally, San Francisco is the dominant employment center in the Bay Area and is projected to add as many as 190,000 jobs by 2040.

Additionally, many of the SFMTA's facilities are in need of rehabilitation and replacement and will be closed in the coming years to be rebuilt and reopened in new configurations that may reduce the ability of employees to continue their informal practice of parking cars on-site. On top of this, some of these facilities have been identified to help provide needed housing units in the City and will become mixed-use properties, adding to the intensity of the property.

With all of the commercial and residential development throughout San Francisco and specifically around many of the SFMTA's facilities, parking is becoming more difficult and conflict around the pressures this creates is increasing with residents and nearby commercial enterprises.

Important considerations

Over the past year, the SFMTA has worked to pilot a Transportation Demand Management (TDM) program at its Woods and 700 Penn facilities. Through this work, employment records and employee surveys were analyzed to identify the travel habits of the women and men who operate and maintain the backbone of Muni's transportation service. The full analysis is available as an attachment to the Request for Proposals (RFP) document.

Because many of the employees at the SFMTA are providing key services for San Francisco's transportation system during peak hours, a large percentage of operators arrive between 4am and 6am in order to get service on the streets before the morning peak. Added to this, a number of the facilities are located in industrial areas that have fewer transportation options than many commercial districts in San Francisco.

Project Goal:

The SFMTA's employees, including frontline staff such as operators, mechanics, shop workers, Parking Control Officers (PCOs), etc, are an important part of the backbone of San Francisco that keeps the City moving and functioning each hour or every day. Ultimately, this plan will support all SFMTA employees in conveniently accessing their jobs no matter their work hours or facility location as San Francisco continues to grow. Many of the SFMTA's operators arrive at work either before various regional transportation service starts running (such as Bay Area Rapid Transit, or BART), or before BART can get them to their shifts, therefore identifying solutions that are more than last-mile solutions may be necessary.

While this plan will look to support shifts in transportation mode, the final plan will need to identify and acknowledge the subset of employees for whom driving to work may be the only viable option. In doing so, the plan will also identify those employees for whom mode-shift is a potential, and tactics for supporting that shift. In doing so, we will not only support employees who make the shift by providing a better connection to non- single occupancy vehicle (SOV) transportation options, but also reduce on-street parking pressure for those for whom driving is a necessity as well as residents and employees who live and work around our facilities.

To this end, the ultimate goal for this plan is to identify the suite of programs and services that will be most likely to significantly reduce SOV trips by employees at all facilities.

The final SFMTA Facilities TDM plan will need to address current employee transportation, but also new programs for facilities that will be replaced in the coming 5-10 years. Therefore, at facilities that are slated to close, rebuild and reopen, the plan must identify a program for both the current configuration and future configuration.

Deliverables:

- 1 **Existing Conditions report:** Based on the above analysis and on-site visits, catalog the existing transportation options, practices, etc. for each facility, as well as the surrounding neighborhood.
 - 1.1 **Analysis to Develop Target Audiences:** For each of approximately 30 facilities identified by the SFMTA, identify employee arrival and departure times and home travel location (zip level) and from this develop likely audiences and cohorts that may successfully shift trips. The list of facilities and employment details will be provided by SFMTA. In some cases the facility will be a planned future remodel rather than an existing facility.
 - 1.2 **Stakeholder Outreach:** Conduct focused outreach to support quantitative analysis with qualitative assessment of opportunities for mode shift. Stakeholders for this project will be many and diverse, they include employees, union representatives, division and subdivision managers and facility operations managers. In some cases neighborhood groups may be engaged as well; the SFMTA will provide background information on past outreach conducted to these groups.
- 2 **Develop TDM Strategy Proposals:** Identify possible approaches to providing information and services that have the potential to reduce drive-alone trips to SFMTA Facilities. Each proposed strategy should include high-level operational details such as staffing needs, cost, required resources, and expected level of effectiveness. Strategies should identify TDM offerings in two distinct areas; Agency-wide and Site-Specific.

Agency Wide: These offerings will include support and services that can be offered to all employees agency-wide, such as employee fairs, travel mapping, travel information, pre-tax transit benefits and emergency-ride home. They should also identify programs and services that will support non-SOV trips by serving multiple sites. An example (for illustrative purposes only): a regional staff shuttle that travels from Solano County to multiple SFMTA services at hours that BART is not available.

Facility Specific: Each facility will have unique transportation constraints and needs based on the personnel, service and location. Examples may include on-site high occupancy vehicle (HOV) parking programs or carpooling assistance. These strategies may also include potential strategies for the neighborhood as a whole.

2.1 Identify TDM Strategies: Based on site analysis and stakeholder outreach, propose suite of TDM strategies that have the highest potential to achieve mode shift and improve commuting for staff at each facility as well as agency-wide. The SFMTA will review proposed TDM strategies and identify top priorities for implementation.

2.2 Develop Detailed Operations Plans: For each approved strategy, contractor will develop an operations plan that includes: lead party accountable and responsible for implementing and operating that strategy; the likely cost and staffing required implement properly; proposed timelines for implementation; plan for developing materials; plan for securing resources and services. Final operations plan will need concurrence with SFMTA staff in order to be accepted so as to ensure that the final plan does not identify positions, divisions or entities that are unable to provide the needed resources, expertise or commitment to ensure successful implementation.

2.3 Evaluation Plan: It will be important, especially in the first five years of the plan, to identify the impact of the plan, including percentage of implementation, reach of implemented strategies in terms of awareness and/or who is able to participate, and actual changes in mode-split by facility. Submittals should identify strategies to measure results that can be easily replicated over many years.

Resources (include links/docs):

SF employee transportation survey

Woods/700 Penn employee data analysis

List of public meetings for any and all facility planning

List of key employee and representative stakeholders

List of facilities, including list of planned remodels (and 1-2 sentence scope)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PORT -- PRT

Dept. Code: PRT

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

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

Type of Service: Hazardous Waste Removal and Marine Vessel Salvage

Funding Source: Port Operating Budget

PSC Amount: \$1,500,000

PSC Est. Start Date: 03/01/2019

PSC Est. End Date: 02/29/2024

1. Description of Work

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

The contractor shall provide all services, personnel, labor, materials, and equipment necessary to package, remove, transport, and dispose of hazardous waste from Port properties. Contractor shall also provide all services, personnel, labor, materials, and equipment necessary to salvage, transport, and dispose of sunken and abandoned marine vessels from waters within Port jurisdiction.

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

The Port manages and oversees an extensive amount of properties some of which are open and cannot be secured. The public routinely abandons hazardous waste products on these properties. Also, every so often, a marine vessel sinks or is abandoned on Port waters. For purposes of safety and regulatory compliance, the Port requires the timely handling, removal, and disposition of these hazardous waste materials and marine vessels. Without this service, the Port is likely to incur repeated notices of violations for failure to handle the materials in a timely manner so they do not negatively impact public health and the San Francisco Bay.

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 contracted out in the past under PSC #4074 11/12.

D. Will the contract(s) be renewed?

This is an ongoing service need so the Port will be looking to rebid the contract at the end of the current term.

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

The contract term will be for four (4) years with option to extend for one more year. A 5-year PSC will give the Port time to use the contract before having to go through the rebid process. It will also make the contract attractive to more contractors than otherwise.

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 work that will be done under this contract is sporadic and intermittent and will only be done as-needed. The service need will arise only when hazardous materials are left at the Port properties or a marine vessel sinks or is abandoned. It is not possible to predict with any certainty, when these events may occur.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The work requires skills and training in hazardous materials handling in compliance with 29CFR 1910.120 and marine vessel salvage in compliance with applicable Federal and US Coast Guard regulations.
- B. Which, if any, civil service class(es) normally perform(s) this work? 6130, Safety Analyst; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide all the supplies, materials, equipment, and transport necessary to perform the services.

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

There are no available resources within the City to perform the work. The work is highly specialized and requires extensive training and regulatory oversight.

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

- A. Explain why civil service classes are not applicable.
This is specialty work that is highly regulated and with significant risks. The safe performance of this work is dependent upon extensive training and regular opportunities to utilize the training.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class. This is specialty work that is highly regulated. The safe performance of this work is dependent upon extensive training and regular opportunities to utilize the training. The Port's need is sporadic and infrequent enough that a new civil service class is not required. It is also not reasonable to accept the liabilities of the work.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. It is not intended that Port employees will perform the work at any time so there is no need for 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 12/12/2018, 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: Lavena Holmes Phone: 415-274-0305 Email: lavena.holmes@sfport.com

Address: Pier 1 San Francisco, CA 94111

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41712 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of lavena.holmes@sfport.com
To: [Holmes, Lavena \(PRT\); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Chan, Annie \(PRT\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Holmes.Lavena (PRT); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Chan, Annie (PRT); DHR-PSCCoordinator, DHR (HRD)@sfport.com)
Subject: Receipt of Notice for new PCS over \$100K PSC # 41712 - 18/19
Date: Wednesday, December 12, 2018 4:37:07 PM

RECEIPT for Union Notification for PSC 41712 - 18/19 more than \$100k

The PORT -- PRT has submitted a request for a Personal Services Contract (PSC) 41712 - 18/19 for \$1,500,000 for Initial Request services for the period 03/01/2019 – 02/29/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12299> 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: PORTDept. Code: PRT

Type of Request: Initial Modification of an existing PSC (PSC # 4074-11/12)

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

Type of Service: Hazardous Waste RemovalFunding Source: Port Operating/Project FundPSC Original Approved Amount: \$375,000PSC Original Approved Duration: 01/01/12 - 12/31/14 (3 years)PSC Mod#1 Amount: no amount addedPSC Mod#1 Duration: 01/01/15-12/31/18 (4 years 1 day)PSC Cumulative Amount Proposed: \$375,000PSC Cumulative Duration Proposed: 7 years 1 day**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Contractor shall provide all services, labor, materials, and equipment necessary to provide hazardous waste packaging, removal, transportation and disposal-related tasks. Critical is the ability for the contractor to provide service with little notice, e.g. 24 hrs., 72 hrs., etc.

Scope Change

The Port had originally planned to issue this contract in 2012, but due to staff changes and the workload of the America's Cup 34 (AC34) preparations, the contract solicitation was delayed. The Port now intends to move forward with the contract solicitation in the first quarter of 2014 and limit the term of the contract to no more than four (4) years. (Please see prior initial PSC attached)

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

The Port property is extensive and open and subject to the abandonment of hazardous wastes. For purposes of safety and regulatory compliance, the Port requires very timely transportation and disposal services of these materials. Without this service the Port is likely to incur repeated notices of violations for failure to manage these materials in a timely way that protects public health and the SF Bay.

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 4074-11/12

D. Will the contract(s) be renewed?

Yes, contract will be renewed & rebid on an on-going basis.

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

Explain the qualifying circumstances:
no response from department

- B. Reason for the request for modification:
Duration Extension

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Because the work involves hazardous material handling or work in and around potentially hazardous or environmentally sensitive areas, it requires highly trained workers capable of working in hazardous environments in compliance with 29CFR 1910.120(Code of Federal Regulations). Also requires to abate asbestos, lead & mold, profile hazardous wastes, provide routine & emergency hazardous waste removal, transportation & disposal and recycling. Please see attached PSC for more information.
- B. Which, if any, civil service class(es) normally perform(s) this work? 6130, Safety Analyst; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, they will provide supplies such as steel and poly drums, absorbent, packaging materials, and other material handling equipment, safety equipment and transportation vehicles.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This is specialty work that is highly regulated and with significant risks. The safe performance of this work is dependent upon extensive training and regular opportunities to utilize the training.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This is specialty work that is highly regulated. The safe performance of this work is dependent upon extensive training and regular opportunities to utilize the training. The Port's need is sporadic and infrequent enough that a new civil service class is not required.

6. Additional Information

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

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 01/29/14, 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: Lavena Holmes Phone: 415-274-0305 Email: lavena.holmes@sfport.com

Address: Pier 1, The Embarcadero, San Francisco, CA 94111

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4074-11/12

DHR Analysis/Recommendation:

04/07/2014

Commission Approval Required

Approved by Civil Service Commission

04/07/2014 DHR Approved for 04/07/2014

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PORT -- PRT

Dept. Code: PRT

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

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

Type of Service: Environmental Review and Analysis

Funding Source: Port Operating Budget

PSC Amount: \$1,000,000

PSC Est. Start Date: 02/01/2019

PSC Est. End Date: 01/31/2023

1. Description of Work

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

The services that will be provided under this contract are the environmental review and analysis of the proposed amendments to updates the Port of San Francisco Waterfront Land Use Plan ("Project") and advice on the impact and implications.

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

The services are necessary in order to meet the statutory and regulatory requirements of the California Environmental Quality Act (CEQA), CEQA Guidelines, CCSF Administrative Code Chapter 31, and the San Francisco Planning Department's Environmental Review Guidelines. Denial of this PSC will mean that the Port will incur repeated violations of these regulatory requirements and guidelines which were created to protect public health and promote conservation. Additionally, denial of the PSC will mean that Port cannot complete the update of the Francisco Waterfront Land Use Plan.

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

This is a new service need resulting from the need to update the Francisco Waterfront Land Use Plan.

D. Will the contract(s) be renewed?

The Port will seek to rebid the contract if there is still a need for the service at the end of the contract term.

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

not applicable

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

The work needs to be performed by personnel engaged in environmental review work with the ability to draft environmental impact reports. The City does not possess the resource to draft an environmental impact report area plan. In addition these services are short term and require expertise in California Environmental Quality Act (CEQA) regulations.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The work requires skills and training in environmental review and monitoring in compliance with the regulations and guidelines of numerous statutory and administrative bodies.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contractor will provide all the supplies, materials, equipment, and transport necessary to perform the services.

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

There are no available resources within the Port to perform the work. The work is highly specialized and requires extensive training and regulatory oversight and the ability to navigate numerous regulatory agencies.

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

- A. Explain why civil service classes are not applicable.
This is specialty work that requires extensive training is highly regulated and with significant implications for public health and nature conservation. The proper performance of this work is dependent upon extensive training and regular opportunities to utilize the training.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class. This is specialty work that is highly regulated. The proper performance of the work requires extensive training and regular opportunities to utilize the training. The Port's need for the services is limited and infrequent enough that a new civil service class is not required.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. It is not intended that Port employees will perform the work at any time so there is no need for 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 12/12/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP

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

Name: Lavena Holmes Phone: 415-274-0305 Email: lavena.holmes@sfport.com

Address: Pier 1 San Francisco, CA 94111

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45798 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of lavena.holmes@sport.com
To: [Holmes, Lavena \(PRT\); Wanless, Annie \(HRD\); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Chan, Annie \(PRT\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Holmes, Lavena (PRT); Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Chan, Annie (PRT); DHR-PSCCoordinator, DHR (HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 45798 - 18/19
Date: Wednesday, December 12, 2018 4:22:34 PM

RECEIPT for Union Notification for PSC 45798 - 18/19 more than \$100k

The PORT -- PRT has submitted a request for a Personal Services Contract (PSC) 45798 - 18/19 for \$1,000,000 for Initial Request services for the period 02/01/2019 – 01/31/2023. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12306> 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: Biosolids Beneficial Use – Land Application

Funding Source: WWE Biosolids Mgt. Operating Budget

PSC Amount: \$2,100,000

PSC Est. Start Date: 04/01/2019

PSC Est. End Date 03/31/2023

1. Description of Work

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

The contractor works with ranchers and farmers to use biosolids as a fertilizer. The contractor secures all necessary permitting required for the use of biosolids as a fertilizer. Annual fees for permitting are paid by the contractor. The contractor manages the agronomic application of biosolids so that nitrogen added to fields does not exceed crop uptake needs. When sufficient biosolids have been added to a field to meet its nitrogen needs, the contractor moves the application operation to a new field. When moving to a new field, the contractor is responsible for coordinating with the trucking contractor for the transportation of biosolids to the new location. The contractor is responsible for ensuring the all county ordinances are followed during the course of operations at each field. This includes the posting of signs, flagging of buffer areas where biosolids are not to be applied, setting up a mobile weather station, a portable toilet and a washdown station for trucks. The contractor is responsible for the spreading and discing (incorporation) of the biosolids on each field. Co-ordination with the ranchers, farmers, and county is the responsibility of the contractor.

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

The City's wastewater treatment plants separate solids out from influent and sends them to anaerobic digesters where they are biologically treated. This service is necessary because the resulting material called biosolids, a nutrient rich material is used as a fertilizer. On average the city produces 175 wet tons of biosolids a day. There is only storage for approximately 24 hours' worth of biosolids production at the City's wastewater treatment plants. If this contract is denied, this biosolids material, which is a resource won't be able to be used, unless there is a system in place for its reuse.

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 always been provided through a contract with the Office of Contract Administration.

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:

This service requires permits that can take multiple years to secure, agreements with farmers and ranchers, heavy equipment and facilities in Solano County to store this equipment. The Wastewater Enterprise does not have these resources necessary for the execution of the services this contract provides.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: This contract requires an agronomist with experience in biosolids application, biosolids permitting and biosolids regulations. Agronomic rates must be calculated for each field. Operations must abide by all regulatory requirements. This contract also requires heavy equipment associated with the application of biosolids including front loaders, tractors, biosolids spreaders, and discs.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor provides permitted land for biosolids reuse, and heavy equipment associated with the application of biosolids including front loaders, tractors, biosolids spreaders, and discs.

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

Wastewater Enterprise has not made an effort to obtain these services through available resources within the city.

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 hold any permits for the application of biosolids for agricultural use. These permits are held by the contractor through an agreement with the farms and ranches where biosolids are applied. The city also does not own the equipment necessary for the application and incorporation of biosolids, nor does the city have a facility to store this equipment in Solano County where the work for this contract occurs. There is also no civil service classification for agronomist.

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. Agronomist could be adopted as a new civil service class. However the city would still not have the requisite permitting nor have the equipment or agreements with farms and ranches necessary to achieve this scope of work.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. The contractor will not train City employees as there are currently no plans for City employees to perform this work.

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

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

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

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

7. **Union Notification:** On 01/17/2019, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44486 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org
To: Jackson, Shamica; annie.wanless@sfgov.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tienkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakavan@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@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@Local39.org; iduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; eccdemvoter@aol.com; thomas.vitale@seiu1021.org; Jackson, Shamica; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44486 - 18/19
Date: Thursday, January 17, 2019 4:41:06 PM

RECEIPT for Union Notification for PSC 44486 - 18/19 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 44486 - 18/19 for \$2,100,000 for Initial Request services for the period 04/01/2019 – 03/31/2023. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12427> 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: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: Professional Design Services

Funding Source: Capital Funds

PSC Duration: 2 years

PSC Amount: \$150,000

1. Description of Work

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

The Recreation and Park Department is seeking the services of a landscape architecture firm to develop a schematic design concept plan for Buena Vista Park that reflects the Capital Improvement plan, community needs and operation maintenance needs. Schematic design will consider the circulation and hardscape, erosion control and water management, and woodland management. The scope will include outreach and community engagement.

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

The Recreation and Park Department is in the process of preparing for the 2019 Parks Bond Measure. It is imperative that concept plans related to this potential bond project are completed in a timely manner to ensure appropriate bond funding allocation. The schematic and design concept drawings must be completed by May 2019.

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.

Both Public Works Landscape Division and Public Works As-Needed Consultants have provided these services in the past.

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

Public Works Landscape classifications do not currently have the availability to work on this project in the time-frame required for bond-planning.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Experience in designing parks and landscapes, knowledge of the Recreation and Parks Capital Plan, and familiarity with the needs of the San Francisco community. Minimum of ten (10) years of experience performing master plan and concept design consulting services. Knowledge of current local, State, and Federal regulations governing design, construction, contracting, environmental, and safety measures.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5262, Landscape Architect Assoc 1; 5274, Landscape Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

The various Public Works Landscape classifications often work to support the Recreation and Park Department on many capital projects, however, they do not currently have the availability to work on this project in the time-frame required for bond-planning.

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

- A. Explain why civil service classes are not applicable.
Public Works Landscape Architecture classifications work in support of the Recreation and Park Department on many capital projects, but they do not currently have the availability to work on this project in the time line that is required. The department is short staffed and unable to meet the required deadlines to ensure adequate time for bond planning. The Recreation and Park Department has engaged the the Landscape Architecture Division, and together we have determined that Public Works will be involved with the project as peer reviewers as they have an institutional knowledge of the park.
- 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. Public Works-Landscape Division is in the process of hiring landscape architects to handle the increased workload of the Recreation and Park Department bond planning.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training will be provided as part of this effort.
- 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 12/05/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40732 - 18/19

DHR Analysis/Recommendation: _____ Civil Service Commission Action: _____

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

McFadden, Sean (REC)

From: dhr-psccordinator@sfgov.org on behalf of sean.mcfadden@sfgov.org
Sent: Wednesday, December 05, 2018 12:07 PM
To: McFadden, Sean (REC); Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; McFadden, Sean (REC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40732 - 18/19

RECEIPT for Union Notification for PSC 40732 - 18/19 more than \$100k

The RECREATION AND PARK COMMISSION -- REC has submitted a request for a Personal Services Contract (PSC) 40732 - 18/19 for \$150,000 for Initial Request services for the period 02/01/2018 – 02/01/2020. 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/12261> 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: SHERIFF -- SHF

Dept. Code: SHF

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

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

Type of Service: Electronic Monitoring and Home Detention

Funding Source: General Fund

PSC Amount: \$3,600,000

PSC Est. Start Date: 05/01/2019

PSC Est. End Date: 04/30/2024

1. Description of Work

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

Services are needed to provide electronic home detention monitoring and case management services for inmates who qualify for home detention as an alternative to jail incarceration. Program participants wear electronic bracelets that communicate via radio frequency to land line telephone or via cellular transmission to a centralized system that monitors the participants. Services include adjunct case management to monitor inmates' attendance in outpatient substance abuse and/or mental health programs, and urinalysis tests to monitor sobriety.

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

These services are needed to reduce jail overcrowding and allow inmates who pose no danger to society to complete their sentences in an electronic home detention/monitoring program. In addition, these services are necessary so participants can return to their community with the opportunity for the Department to track their compliance with sentencing requirements. If this contract extension is denied, persons released to electronic monitoring would be removed from the program and returned to custody.

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

This service is currently performed under PSC #48796-13/14.

D. Will the contract(s) be renewed?

The Sheriff's Department will issue a Request for Proposal (RFP) in July 2018.

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 electronic home detention monitoring program and case management service provides qualified inmates with an alternative to jail incarceration. The program is proven to reduce recidivism. However, for the program to be effective, it requires consistencies in case management and counseling services provided to inmates. The proposed contract term will be for 3 years with two options to extend term for one additional year with a maximum contract term of five years.

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 Sheriff's Department and the City does not have the specialize technology and expertise required to successfully administer an electronic monitoring program. The service requires staff that are trained and experienced in monitoring and counseling participants with proprietary electronic bracelets, alcohol testing and urinalysis. In addition, staff must be able to activate electronic monitoring device and track participants on real-time digital maps, via proprietary specialized communication systems.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must be trained and experienced in monitoring participants with proprietary electronic bracelets, alcohol testing and urinalysis. In addition, staff must be able to activate electronic monitoring device and track participants on real-time digital maps, via proprietary specialized communication systems. Contractor's staff notifies sworn staff when participants violate the terms of their monitoring.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide electronic Global Positioning System bracelets, wearable alcohol monitoring devices and hand-held portable alcohol testing devices.

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

Given the specialize technology and expertise required to successfully administer an electronic monitoring program; the City does not have the resources to provide this service.

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

A. Explain why civil service classes are not applicable.

There are no civil service class that provides all the services and equipment detailed above. Further, the Sheriff's Department cannot accurately predict on a month-to-month basis how many inmates will qualify for electronic monitoring.

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, given the tasks associated with the services, it would not be practical to adopt a civil service classification to combine electronic bracelet monitoring via specialized communication systems, with case management and alcohol testing services.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. Contractor will provide comprehensive training to the Sheriff's Department Supervisory staff on the use of the electronic monitoring equipment and proprietary tracking software and techniques. The approximate number of training hours per staff will be 16-20 hours. The approximate number of staff requiring training will be ten.

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

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

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

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

7. **Union Notification:** On 05/25/2018, the Department notified the following employee organizations of this
PSC/RFP request:
all unions were notified

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

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

Address: 1 Dr. Carlton B. Goodlett Place, Room 456 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44727 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

Gong, Henry (SHF)

From: dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org
Sent: Friday, May 25, 2018 11:22 AM
To: Gong, Henry (SHF); tekpro49@comcast.net; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; mathews.timothy@gmail.com; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@Local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@Local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; camaguey@sfmea.com (contact); ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Gong, Henry (SHF); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44727 - 17/18

RECEIPT for Union Notification for PSC 44727 - 17/18 more than \$100k

The SHERIFF -- SHF has submitted a request for a Personal Services Contract (PSC) 44727 - 17/18 for \$3,600,000 for Initial Request services for the period 05/01/2019 – 04/30/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/11093> 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

Choi, Suzanne (HRD)

From: Gong, Henry (SHF)
Sent: Friday, February 08, 2019 3:45 PM
To: tjenkins@uapd.com; kcartermartinez@cirseiu.org; kgeneral@ifpte21.org
Cc: Choi, Suzanne (HRD)
Subject: RE: Courtesy Notification - PSC #44727-17/18

This is not a re-notification for PSC #44727-17/18. The initial notification was sent on May 25, 2018.

This is a courtesy notification. PSC #44727-1718 is scheduled to be reviewed on March 4, 2019 at the Civil Service Commission Meeting.

Thank you.

From: Gong, Henry (SHF)
Sent: Friday, February 08, 2019 3:38 PM
To: 'henry.gong@sfgov.org' <henry.gong@sfgov.org>; tekpro49@comcast.net; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; mathews.timothy@gmail.com; amakayan@ifpte21.org; jb@local16.org; Basconcillo, Katherine (PUC) <kbasconcillo@sfgwater.org>; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@Local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@Local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; camaguey@sfmea.com (contact) <camaguey@sfmea.com>; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Cc: Choi, Suzanne (HRD) <suzanne.choi@sfgov.org>
Subject: RE: Courtesy Notification - PSC #44727-17/18

This is not a re-notification for PSC #44727-17/18. The initial notification was sent on May 25, 2018.

This is a courtesy notification. PSC #44727-1718 is scheduled to be reviewed on March 4, 2019 at the Civil Service Commission Meeting.

Thank you.

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

From: dhr-psccordinator@sfgov.org [mailto:dhr-psccordinator@sfgov.org] On Behalf Of henry.gong@sfgov.org
Sent: Friday, May 25, 2018 11:22 AM
To: Gong, Henry (SHF) <henry.gong@sfgov.org>; tekpro49@comcast.net; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; mathews.timothy@gmail.com; amakayan@ifpte21.org; jb@local16.org;

Ricardo.lopez@sfgov.org; [Basconcillo, Katherine \(PUC\) <kbasconcillo@sfwater.org>](mailto:Basconcillo,Katherine(PUC)<kbasconcillo@sfwater.org>); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@Local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; [Poon, Sin Yee \(HSA\) <sin.yee.poon@sfgov.org>](mailto:Poon,SinYee(HSA)<sin.yee.poon@sfgov.org>); smcgarry@nccrc.org; rmitchell@twusf.org; grojo@Local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; camaguey@sfmea.com (contact) <camaguey@sfmea.com>; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Gong, Henry \(SHF\) <henry.gong@sfgov.org>](mailto:Gong, Henry (SHF) <henry.gong@sfgov.org>); DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

Subject: Receipt of Notice for new PCS over \$100K PSC # 44727 - 17/18

RECEIPT for Union Notification for PSC 44727 - 17/18 more than \$100k

The SHERIFF -- SHF has submitted a request for a Personal Services Contract (PSC) 44727 - 17/18 for \$3,600,000 for Initial Request services for the period 05/01/2019 – 04/30/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/11093> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

City and County of San Francisco

Request for Proposals for

**Electronic Monitoring Services and Case Management
Program**

RFP #SHF2019-01/ Event ID 0000001210



Date issued:

Friday, September 28, 2018

Pre-proposal conference:

Tuesday, October 16, 2018, 8:30 a.m.

Proposal due:

Monday, November 5, 2018, 2:00 p.m.

Request for Proposals for Electronic Monitoring and Case Management Program

TABLE OF CONTENTS

	<u>Page</u>
I. Introduction and Schedule	1
II. Scope of Work	3
III. Submission Requirements.....	13
IV. Evaluation and Selection Criteria	17
V. Pre-proposal conference and Contract award	21
VI. Terms and Conditions for Receipt of Proposals	22
VII. Contract Requirements.....	29
VIII. Protest Procedures.....	31

Appendices:

- A. Standard Forms: Listing and Internet addresses of Forms related to Taxpayer Identification Number and Certification, to Business Tax Declaration, and to Chapters 12B and 12C, and 14B of the S.F. Administrative Code.
- B. Fee Proposal
- C. Agreement for Professional Services (form P-600) (separate document)

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Request for Proposals for

Electronic Monitoring Services and Case Management Program

I. Introduction and Schedule

A. General

The City and County of San Francisco Sheriff's Department ("SFSD") seeks responses to a Request for Proposal for an Electronic Monitoring/Home Detention Service and Case Management Program for the San Francisco City and County Jails. The Department estimates 1100-2100 detainee-participants will go through the program per year, with an average of 150-300 participating at any one time. On average, detainees participate in the program between four and six months. The maximum length of time for participants is one year. SFSD has provided these services for a number of years as an alternative to incarceration for inmates who can be supervised out of custody where they are able to continue to attend school and work, and remain in their homes and communities. Global Positioning Systems (GPS) tracking and transdermal monitoring are the preferred types of electronic monitoring for detainees in this RFP.

The contract shall have an original term of three (3) years. In addition, the City shall have two (2) options to extend the term for a period of 1 year each, which the City may exercise in its sole, absolute discretion. In the event such extension right is exercised, all terms and conditions, requirements and specifications of the Agreement shall remain the same and apply during the renewal term. The maximum contract period is not anticipated to be more than five (5) years. Should the contract reach five full years, the contract may continue for a short period, not to exceed six (6) months, to allow for a smooth transition to a new contract.

The contract total compensation for the original period is expected to not exceed **Three Million Four Hundred Thousand Dollars (\$3,400,000)**. Should the contract be extended, the annual compensation will increase at a rate similar to the per year costs of the original term. Proposers may submit proposals with greater or lesser value, and cost and reasonableness of rates will be considered as part of the evaluation.

B. Schedule

The anticipated schedule for selecting a consultant is:

<u>Proposal Phase</u>	<u>Date</u>
RFP is issued by the City	Friday, September 28, 2018
Pre-proposal conference	Tuesday, October 16, 2018, 8:30 am
Deadline for submission of written questions or requests for clarification	Thursday, October 18, 2018, 12:00 pm
Answers to final questions	Monday, October 22, 2018, 1:00 pm
Proposals due	Monday, November 5, 2018, 2:00 pm
Proposers' presentation and equipment demo	Thursday, November 15, 2018, 9:30 am

C. Contractors Unable to do Business with the City

1. Generally

Contractors that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Some of the laws are included in this RFP, or in the sample terms and conditions attached.

2. Companies Headquartered in Certain States

This Contract is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into contracts with companies headquartered in states with laws that perpetuate discrimination against LGBT populations or where any or all of the work on the contract will be performed in any of those states. Proposers are hereby advised that Proposers which have their United States headquarters in a state on the Covered State List, as that term is defined in Administrative Code Section 12X.3, or where any or all of the work on the contract will be performed in a state on the Covered State List may not enter into contracts with the City. A list of states on the Covered State List is available at the website of the City Administrator.

II. Scope of Work

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project.

The following are work tasks assumed necessary to an electronic monitoring service and case management program. Proposing teams may suggest a modified scope as part of their proposal.

To minimize duplication of effort and to allow the City to coordinate data requests and data available for the services requested within this RFP, as well as for previous and future projects, the selected Contractor's findings and data may be shared by the City with other City contractors, as deemed appropriate by the City.

A. Electronic Monitoring Service and Case Management Requirements

Contractor will operate in compliance with any available standards and all laws applicable to the operation of electronic monitoring programs and the supervision of offenders in an electronic monitoring program per California Penal Code section 1203.018.

Contractor will operate in compliance with any available standards promulgated by state correctional agencies and bodies, including the Corrections Standards Authority, and all statutory provisions and mandates, federal, state and county, as appropriate and applicable to the operation of home detention programs and the supervision of sentenced offenders in a home detention program per California Penal Code section 1203.016.

1. Referrals

The San Francisco Sheriff's Department (SFSD), the Courts, or the detainee's attorney will make referrals. SFSD will screen all referrals and determine which detainees can be safely supervised via electronic monitoring. The Sheriff's Department may allow out-of-county participants to be monitored, provided they meet the Sheriff's criteria.

2. Orientation and Equipment Installations

The Sheriff's Department will notify the Contractor regarding a detainee's impending participation in the City's Electronic Monitoring (EM) program.

The Contractor will orient and activate the EM equipment on the day SFSD notifies the Contractor that a detainee will participate in the EM program. The Contractor will orient the detainee and will install the EM equipment at the Sheriff's facilities at 70 Oak Grove or 930 Bryant, or at an SFSD predetermined location. In addition, the Contractor will install, replace, repair, and activate EM equipment in the field at off-site locations authorized by SFSD. As part of the orientation process, the Contractor will provide participants with a first-week schedule during the EM equipment installation.

Following installation, the Contractor will confirm that the EM equipment is activated and operational and will notify SFSD immediately, via email, following successful installation. The Contractor will ensure that all EM equipment is activated and operational the same day it is installed.

3. Initial Assessment

Once the SFSD has determined that a detainee can be safely supervised via electronic monitoring, the Contractor will complete an initial assessment of each program participant prior to the date EM equipment is scheduled for installation. Contractor will have face to face meetings with participants two times per month and will verify documentation of work, school, and any approved community activities bi-weekly. SFSD will have the option to request Contractor to perform a needs assessment of participant(s), such as Compass Assessment. The contractor will provide to SFSD an electronic participant assessment file that contains, at minimum:

- a) Program application
- b) List and schedule of approved activities
- c) Verification of employment and/or proof of education class enrollment
- d) List of all verified sources of income
- e) Verification of participation in a church, synagogue, mosque or other spiritual activity, as appropriate
- f) Program goals to include treatment plans
- g) All special needs
- h) Approved payment plan and payment schedule

4. Case File

Upon enrollment, the Contractor will create and maintain an electronic case file for each participant. Contractor will utilize an electronic case file management database system to allow access and storage of the initial assessment and supporting documents in addition to a hard copy (paper copy) on file. Such file shall contain detailed information from the participant's initial assessment, program activities, employment, out-of-residence movement, and all other relevant activities. At a minimum the case file will include the following:

- a) Personal Data
 - Name, address, telephone numbers, emergency contacts
 - List of all verified sources of income
- b) Program Data
 - Referral
 - Initial assessment
 - Orientation checklist
 - Appropriate equipment and equipment settings
 - Result of initial drug test performed by Contractor within the first week of enrollment
 - Program goals to include treatment plans
 - Start/End Dates
 - Participant's schedule (i.e. curfew, school, work, etc.)
 - Detailed information on participant's program activities
 - All program violations including date, time, and type
 - Restrictions, such as, but not limited to: Inclusion and Exclusion Zones, curfews, and travel
 - Sanctions imposed

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

- Approved locations
- Verification of employment and/or proof of education class enrollment and school schedule, as appropriate
- All special needs

Contractor will note all updates to participants' schedules and contact information in the electronic master list within 24 hours of the schedule or contact information change. Contractor will provide all files to the SFSD upon request.

5. Client Monitoring

The Contractor shall provide a full time Site Manager to supervise contractor staff and coordinate efforts with SFSD staff. The Site Manager may supervise up to ten (10) participants when the participant numbers are below 70 and shall provide technical expertise during violation hearings and enforcement actions, attend monthly staff meetings, and liaison between SFSD and other agencies. Further, the Site Manager shall provide continuous training for all SFSD Community Programs and Contractor staff on all participant tracking software and EM devices. The Site Manager will be the point of communication between the Contractor and the SFSD for billing purposes and will collect payment and resolve any discrepancies that may occur. The Site Manager will work at an SFSD site such as 70 Oak Grove or the Women's Resource Center (WRC).

The Contractor shall provide Case Manager(s) at a ratio of 1 Case Manager to every 35 clients enrolled in EM and provide the following case management services with each participant:

- Office Meetings** - Contractor will employ a Case Manager/s who will meet with each program participant at an SFSD site such as 70 Oak Grove or the Women's Resource Center (WRC) at least once every 30 days. At this meeting, the Case Manager will review and verify the participant's activities during the previous period and will inspect the EM equipment and verify it is operational and securely attached to the participant's ankle. The Contractor will submit a complete report of all Office Meetings by the deadline specified, if requested by the SFSD or Courts.
- Employment/School Verification** – Each 30 days Contractor will collect a copy of the program participant's latest paycheck stub to confirm their employment status. A copy of the pay check stub will be submitted to the participant's case file. Contractor will collect a copy of the program participant's most recent school registration form, class schedule, and upon completion of the school term, will collect a copy of their report card and will submit this information to the participant's case file.
- Urinalysis and Drug and Alcohol Screening** - The Contractor will collect a urine sample or saliva swab drug test from each participant at least once every 30 days and will test the sample for marijuana, heroin, amphetamine, PCP and cocaine via a Substance Abuse Screening Device such as Redi-Cup. The Contractor will provide substance abuse screening devices at no cost to the SFSD. The Contractor will test blood alcohol content at least once every 30 days via Portable Alcohol Screening Device

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

(PAS) or Breathalyzer, as determined by SFSD. All urine samples, saliva swab tests, and blood alcohol tests will be administered at no cost to SFSD. The Department will determine whether the Contractor will collect a urine sample or saliva swab drug test. Contractor will promptly carry out any additional testing orders requested by a Judge, or by the SFSD. If test results are appealed by the participant, the Contractor will take another sample and send to an independent lab for testing at no additional cost to the SFSD. The Contractor will provide all test results to the SFSD immediately in writing or within seven (7) days of receipt if more conclusive analysis is needed. Contractor will record all test results in the participant's case file.

d) 24-Hour Monitoring - The Contractor will monitor all EM participants 24 hours a day, seven (7) days a week.

- i. One time per week, the Contractor will provide SFSD with an electronic master list of all individuals participating in the EM program. At the minimum the master list will include:
 - Participant's name and address
 - Participant's program start date, violations, case manager name and contact information.
- ii. Contractor must provide SFSD access to participant's location 24 hours a day, seven days a week.
- iii. Contractor will provide SFSD with a web-based interface to access all monitoring data. All data will be stored on secure servers/cloud that belong to the Contractor.
- iv. The Contractor will notify SFSD via email and by phone, as soon as possible but no later than one hour after a participant has been Absent Without Official Leave (AWOL), or an alarm goes off due to tampering, dead battery, loss of equipment communication or location data or a cut bracelet and there is no communication with the participant. The Contractor will provide an electronic written report of all AWOL incidents the next business day and a final written summary report within 24 hours of resolution.
- v. The Contractor must have a 24 hour technical support center that can be accessed by the SFSD 24 hours a day, seven (7) days a week, 365 days a year to provide a safety net of technical support during exigent circumstances at no additional cost to the City. The support will cover:
 - Monitoring difficulties
 - Web/System interface navigation questions
 - Equipment questions
 - Report requests

e) High Security Monitoring – SFSD have the option to assign participants as High Scrutiny Monitoring. High Scrutiny Monitoring will require the Contractor to provide 24-Hour Monitoring as detailed in section II.A.5.d and will require the Contractor to notify SFSD via email and by phone *immediately* after a participant has been Absent Without Official Leave (AWOL), or an alarm goes off due to tampering, dead

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

battery, loss of equipment communication or location data or a cut bracelet and there is no communication with the participant, or zone violation.

f) **Meetings and Access** - The Contractor will participate in meetings with the SFSD Community Programs and Command staff as required.

g) **Training** - The Contractor will train all SFSD Community Programs staff in the use of equipment and monitoring techniques.

h) **Reports** - The Contractor will submit written reports, as requested, and in the format determined, by the SFSD Community Programs staff. At the minimum, the following is required:

- i. **Daily Violations Reports** – Listing the participant’s name, date, time, and type of violation, including violations of movement and/or curfew restrictions, equipment malfunctions/tampers, battery status and any other problem related to the status of the participants.
- ii. **Daily Charging Reports** – Listing the participant’s name, date, and detailed charging data.
- iii. **Location Correlation Reports** – SFSD may request a comprehensive detailed report to confirm whether a particular participant was present at a specified location within a specified time frame.
- iv. **Investigative Reports** – SFSD may request a comprehensive detailed report of a particular participant’s whereabouts during a specified time frame.
- v. **Proximity Reports** – Shall be available on the web-based interface.
- vi. **Statistical Reports** – SFSD may request a comprehensive annual statistical report of program participants. The report at the minimum shall include participants’ names, program start dates and program end dates.
- vii. **Master List Report** must be made available on a weekly basis. At the minimum the report will include:
 - Participant’s name and address
 - Participant’s program start date, violations, case manager name and contact information

B. General Requirements

1. **Invoicing** - Contractor will submit invoices in the format required by SFSD for the previous month’s service by the 15th day of the current month, and must contain all necessary documentation to verify validity. Invoices must state, but may not be limited to the following:

- a) Client’s name
- b) Individual services provided with the corresponding charge per service
- c) Number of days client participated per service.

2. **Contractor and Contractor Employee Requirements** - All Contractor employees working in the jail will maintain current jail clearance and will participate in the San Francisco Sheriff’s Department Jail Clearance Orientation Training. All Contractor employees must be able to participate in field

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

enforcement and compliance activities with appropriate personal protection equipment; such as ballistic vest, protective clothing, helmets, goggles, or other garments or equipment designed to protect the wearer's body from injury or infection. The Contractor will provide the personal protection equipment for their employees.

C. Equipment Requirements

1. GPS (Active, Passive, Optional HMU via Landline or Cellular):

- a) Must be capable of producing mapping displays and reports that include participant location, zone violations, tampering & battery status.
- b) Must have capability to determine if a participant has violated a zone/schedule that is associated with an area on a map. System must allow for up to 100 of these schedules.
- c) Must allow areas to be designated as areas where participant a) should be, b) should not be, or c) optional.
- d) Must allow an agency to break out caseloads by branch and case manager.
- e) Must allow caseworker to include notes related to system generated alerts. Notes should be capable of being attached to alert.
- f) Must allow caseworker to determine reporting intervals.
- g) Must be FCC Specific Absorption Rate (SAR) compliant, certified one-piece/single-body-attached devices housing the receiver and transmitter in a single unit. All participant equipment (except a charging cable) must be included in a 1-piece, ankle attached device and must report all information exclusively through the cellular network. Must be as small and inconspicuous as possible - Dimensions shall be no larger than approximately 3.5" (L) x 2.5" (W) x 1.6" (D), eight and four tenths (8.4) ounces or must be consistent in size and weight with the latest industry standards.
- h) All devices must provide alternative location tracking using the cellular network in the absence of GPS at no additional cost. If available, Wi-Fi tracking in absence of GPS will be provided at no additional cost.
- i) All devices must attach to the participant with either a reusable or field replaceable strap that is adjustable to fit the participant and attaches at the handle. Contractor shall replace reusable straps once every year at no additional cost or shall provide six (6) disposable straps per unit per year at no additional cost.
- j) All devices shall be capable of being attached to the participant with the fewest pieces possible.
- k) All devices shall be capable of being attached to the participant so that efforts to tamper with or remove the bracelet are obvious upon visual inspection and provide immediate tamper detection and alert reporting.
- l) All devices shall remain in "tamper" until a Case Worker has inspected the device and cleared the alert. In the event a tamper does occur, the device shall not terminate the signal, shut down, or "reset" itself in any way.
- m) All devices shall be shock resistant, waterproof to at least 30 feet, and function reliably under normal atmospheric and environmental conditions. The GPS device casing must be waterproof and must be able to withstand environmental factors.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

- n) The device shall not pose a safety hazard or unduly restrict the activities of the participant.
- o) All devices must be capable of tracking indoors and outdoors. Proposals shall define specifically how indoor tracking is achieved.
- p) Devices proposing methods of secondary tracking in addition to GPS must specify the timing interval at which the secondary tracking technology is occurring (Example: Secondary tracking via cellular triangulation occurring every thirty (30) minutes) and must also specify how the web based system reflects the secondary tracking versus GPS mapping and whether the two tracking technologies are integrated as part of the mapping or if they require caseworkers to compare two separate indicators such as mapping for GPS with a separate cellular zone for secondary tracking.
- q) The Sheriff's Department prefers integrated systems with both GPS and secondary tracking.
- r) Must be equipped with technology that eliminates drift and ensures that participant's points on the map are accurate.
- s) Must have internal, rechargeable, non-removable battery power.
- t) Must be equipped with a minimum battery life of 24 hours on a single charge. The GPS device must be equipped with a wall charger cord for easy recharging. The GPS device must be capable of being fully recharged within 90 minutes.
- u) Must provide a low power signal, visual indicator and vibrating alarm to indicate that the device should be recharged.
- v) The Contractor shall provide any replacement power sources for use with the GPS device that fail under normal use.
- w) Must incorporate multiple, multicolor indicators that can be disabled and that communicate the following to participant:
 - i. Six (6) hours of battery life remaining
 - ii. Two (2) hours of battery life remaining
 - iii. Charging
 - iv. Tamper mode
- x) Must have a vibrating alarm for participant communication.
- y) Device must be remotely controlled through the web based system to perform at multiple status levels including but not limited to a) Passive, b) Active, c) Others and shall enable the Case Worker to increase or decrease the status intensity without needing to change equipment, come in contact with the equipment or the participant, and without alerting the participant to such a change in supervision.
- z) Active GPS must collect a tracking point at least once every thirty (30) seconds, and must report information via the cellular network at least once every three (3) minutes and must report tampering and zone violations immediately. **Devices proposed for Active GPS that utilize less frequent intervals shall be rejected and not evaluated.**
- aa) In cases where Active GPS is not feasible, Passive GPS must collect a tracking point at least once every one minute, and must report information via a cellular or landline telephone at least once every thirty (30) minutes.
- ab) In addition to cellular and GPS transceivers, the 1-piece body attached GPS device may incorporate a transceiver capable of two-way communication with an optional full feature home monitoring unit (HMU) capable of Radio Frequency (RF) based presence/absence residential tracking. This capability is required for participant residences within

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

multi-dwelling buildings in/around San Francisco. The full feature HMU must have the following minimum requirements:

- i. Proposed HMU device shall be small and inconspicuous as possible – Dimensions shall be no larger than approximately 3.75” x 7” x 7.75” and weigh no more than four (4) pounds.
- ii. HMU shall incorporate non-volatile memory capable of storing 2,500 events with date and time stamp.
- iii. HMU shall operate from 110VAC commercial electricity and have internal rechargeable batteries back-up capable of performing all functions for in excess of 50 hours of continuous operation.
- iv. HMU shall be available in models supporting landline and cellular communications.
- v. HMU shall incorporate a transceiver capable of two-way communication with the 1-piece body attached GPS device.
- vi. HMU shall detect and report tampering and motion, as well as disconnect/reconnect of electrical power and telephone line.
- vii. HMU shall incorporate an LCD to display alphanumeric prompts to both participants and Contractor and SFSD staff.
- viii. HMU shall incorporate front panel controls enabling secure Contractor and SFSD access to perform:
 - 1) Variable range testing
 - 2) Variable range settings (Low, Medium, High)
 - 3) Variable reporting interval in one (1) hour increments with a default of four (4) hours
 - 4) Pairing with 1-piece body attached GPS device
 - 5) Diagnostic testing
- ix. Optional - Capability of the proposed Active GPS to automatically increase tracking and reporting intervals at times when in zone breach violation mode and return to the primary Active intervals when leaving zone breach/violation mode. Any such optional capabilities must be at no additional cost and included in the base Active GPS price proposed.

2. Mobile Breath Alcohol Testing Device:

- a) Device shall collect and report a color participant image at time of test for participant verification.
- b) Device shall be small/handheld, no larger than approximately 6” x 2.4” x 1.4”, lightweight no more than approximately 6.8 ounces, thus capable of being mobile with the participant and capable to test in all locations.
- c) Device shall utilize fuel cell technology that is specific to alcohol to perform a deep lung sample and measure the exact Breath Alcohol Content (BAC) from the participant being tested. The device shall confirm the BAC level to the central computer.
- d) Device shall provide immediate reporting via cellular and include all communications costs within the proposed price
- e) If in a cellular disadvantaged area, the device shall continue to test and store results along with the date and time of each test, and continue attempting to report until successful reporting to the monitoring center.
- f) Device shall not require body attached equipment, home equipment, or a home phone line.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

- g) Device shall be capable of performing random, scheduled and on-demand testing.
- h) Device shall additionally perform tracking of participant location at time of each test.
- i) Device shall have a re-chargeable battery that will recharge within 60 minutes and will perform all functions for a 24 hour period on a single, complete charge.
- j) Device shall provide optional capability for Contractor/SFSD staff-to-participant text communication plus participant acknowledgement.
- k) Device shall provide multiple methods of guidance and functionality to the participant during the testing process including:
 - i. Audible prompts for time to test
 - ii. Multiple instructional alpha-numeric display prompts to guide participant through testing
 - iii. Multi-colored LED indicators
 - iv. Test button
 - v. Acknowledgement button
 - vi. Front panel lights to ensure quality image
- l) Device shall minimally provide the following results:
 - i. Email alerts with numeric BAC reading
 - ii. Color facial participant image taken at time of test
 - iii. Web-based geo-map of participant location at time of test

3. Continuous Alcohol Monitoring (CAM) Device (via Landline or Cellular or Wifi):

- a) Device shall measure the ethanol concentration in a discrete sample of the ethanol vapor as insensitive perspiration or the unnoticed perspiration that occurs continuously and shall be obtained via body attached device without the need for active participation by the participant. The device must be able to distinguish between environmental factors and actual consumption.
- b) Device shall detect and report tampering/removal and be tamper evident via Temperature, Infra-red, or other methods and tamper evident capabilities.
- c) Device shall provide for testing to be automatically conducted at fixed intervals that can be set by the Contractor or SFSD staff as frequently as once every 30 minutes.
- d) The ankle worn unit must incorporate replaceable batteries with minimum six (6) month life duration of proposed battery and the basis for replacement of batteries and/or ankle worn unit including details of the number of small parts (screws, clips, rails, etc.) that must be replaced.
- e) Contractor shall provide HMUs capable of reporting data via landline phone line.
- f) Contractor must offer an optional companion cellular and Wifi transceiver (for CAM participants without landline phone lines). Contractor proposal prices shall be inclusive of all communication costs be it landline or cellular.
- g) The proposed CAM device shall also provide integrated RF presence/absence residential tracking via the same device and same web-based information system.
- h) The proposed CAM device shall be peer reviewed, able to withstand judicial scrutiny and meet the Frye Daubert Rulings and Federal

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Rules of Evidence (FRE) 702 and 703 and single source admissibility standards

i) CAM must be FCC compliant.

4) Tracking Equipment:

a) The contractor will provide portable tracking devices for field enforcement and compliance activities so as not to interfere with the ability of SFSD staff to actively engage participants during enforcement actions.

b) Tracking Equipment shall remain current with industry standards and practices for like purposes or applications.

5) Optional Equipment:

a) Contractors may present electronic monitoring devices and/or programs (such as a victim EM to notify if client is within their restricted area).

6) Equipment Replacement: Contractor will incorporate inventory shrinkage due to lost or damaged devices into total contract pricing. Contractor will be responsible for all maintenance of the equipment, including that required from damage, destruction, or loss of equipment by participants. The SFSD will not require the participant(s) to replace or pay for any lost or damaged equipment. SFSD and the City and County of San Francisco, and any San Francisco City and County employees shall not be responsible for damaged and/or lost equipment.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

III. Submission Requirements

A. Time and Place for Submission of Proposals

Proposals must be received by 2:00 p.m., on **November 5, 2018**. Postmarks will not be considered in judging the timeliness of submissions. Proposals may be delivered electronically via the City's PeopleSoft system, or in person to, San Francisco Sheriff's Department – Finance, 1 Dr. Carlton B. Goodlett Place, Room 456, San Francisco, CA 94102 (**marked to the attention of Henry Gong**) or mailed to:

Sheriff's Department – Finance
Attn: Henry Gong
1 Dr. Carlton B. Goodlett Place, Room 456
San Francisco, CA 94102

For hardcopy deliveries, Proposers shall submit **four (4) bound** copies of the proposal. (Note: "Bound" is defined as 3-hole punched and in a binder. Please do not submit stapled or rubber banded proposals.) Once copy shall be marked "original" and the other three marked "Copy".

Two copies, separately bound, of required CMD Forms in a sealed envelope clearly marked **RFP #SHF2019-01, "Electronic Monitoring Service and Case Management Program"** and submitted along with the proposals. Please provide response to the fee proposal in a separate, sealed and clearly marked envelope, and submit with your proposal packet, as described above. Proposals that are submitted by fax or email will not be accepted. Late submissions will not be considered. Stapled and rubber banded proposals will be returned to the submitter for repackaging.

B. Format

The proposed services must be clearly explained including a detailed description of the tasks, equipment, and services that will be used to meet the proposal requirements. The reader of the proposal should have a clear understanding of each portion as well as the overall process. The proposal shall state any possible limitations that the Proposer may encounter. The use of acronyms, legal terms and industry jargon should be avoided.

Hardcopy

Place proposals in three-ring binders for the review panel. Please use three-hole recycled paper, print double-sided to the maximum extent practical, use recycled paper that is comprised of minimum of 30% post-consumer materials, and bind the proposal with a binder clip, rubber band, or single staple, or submit it in a three-ring binder. Please do not bind your proposal with a spiral binding, glued binding, or anything similar. You may use tabs or other separators within the document.

For word processing documents, the department prefers that text be unjustified (i.e., with a ragged-right margin) and use a serif font (e.g., Times Roman, and not Arial), and that pages have margins of at least 1" on all sides (excluding headers and footers).

Please include a Table of Contents and use clearly marked tabs indicating the various sections from the Table of Contents.

Electronic

Submit an electronic version of the complete proposal on a USB stick, CD or via the City's PeopleSoft bidding system.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

For word processing documents, the department prefers that text be unjustified (i.e., with a ragged-right margin) and use a serif font (e.g., Times Roman, and not Arial), and that pages have margins of at least 1" on all sides (excluding headers and footers).

Please include a Table of Contents.

C. Content

Firms interested in responding to this RFP must submit the following information, in the order specified below: Your proposal shall not exceed **twenty-one (21)** pages.

1. Introduction and Executive Summary (up to 1 page, single-sided page)

Submit a letter of introduction and executive summary of the proposal. The letter must be signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal.

2. Project Approach (up to 15 pages, single-sided pages)

Provide a description of your firm's approach to providing services that match the specifications outlined in the Scope of Work.

- a. Case Management. Describe the services and activities you will provide in order to meet or exceed the case management requirements described in the Scope of Work.
- b. Monitoring and Reports. Describe your ability to provide monitoring and required reports as outlined in the Scope of Work.
- c. Meetings and Trainings. Describe your experience in providing trainings as outlined in the Scope of Work.
- d. Equipment. Describe how the equipment you will provide meets or exceeds the equipment specifications described in the Scope of Work.

3. Firm Qualifications (up to 3 pages, single-sided pages)

Provide information on your firm's background and qualifications which addresses the following:

- a. Name, address, and telephone number of a contact person; and
- b. A brief description of your firm, including the number of years your firm has provided electronic monitoring services and case management, the firm's experience serving a diverse population, and how any joint venture or association would be structured.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

- c. Organizational chart that shows how service provided fits into provider's organization
- d. A description of not more than three projects similar in size and scope and quantitative outcome measures for each, which includes client name, reference, email address and telephone numbers, staff members who worked on each project, budget, schedule, and project summary. The Department may contact Project contacts.
- e. A list of all prior contracts with government agencies that have been terminated for non-performance, non-compliance, or any other reason in the last five years. Describe the reason for the termination and provide name, address, and telephone number for government agency contact. The Department may contact these prior contacts.
- f. A list of all lawsuits or hearings initiated by any government agency or court related to contract non-performance or non-compliance in the last five years in which your firm was a party. Describe the reason for the lawsuit or hearing and provide name, address, and telephone number for government agency contact. The Department may contact these contacts.
- g. A list of all contracts from which your firm withdrew. Describe the reason for the withdrawal and provide name, address, and telephone number for government agency contact. The Department may contact Project contacts for these contracts.

4. Team Qualifications (up to 2 pages, single-sided pages)

Provide a position chart that describes the number of positions that will be provided, a duty statement for each position, whether the position is now filled, and if so, the number of years of experience and educational background of each incumbent.

- a. Provide a list identifying: (1) each key person on the project team, (2) the project manager, (3) the role each will play in the project, and (4) a written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval.
- b. Provide a description of the experience and qualifications of the project team members, including brief resumes if necessary.

5. Fee Proposal

Please complete Appendix B - Fee Proposal and submit in a separate sealed envelope or electronically in a separate file labeled with RFP #SHF2019-01 Electronic Monitoring Services and Case Management – Fee Proposal.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Fee proposals submitted in alternative formats will be disqualified. Only items included in the Fee Proposal Format will be used to score the Fee Proposal.

Appendix B, Section B, Items 1 to 3 will NOT be included in the scoring, but may be used to negotiate the awarded contract. To calculate costs for items 1, 2, and 3, it is acceptable to use maximum case load ratio, including staff supervision assumptions and a breakdown between staff and equipment costs. If there are other factors that were used to calculate cost, please include those as well. Additional and separate cost reimbursement will not be provided by the City. Estimates should be based on Proposer's previous experience with projects similar in size and scope to that of this RFP.

The City intends to award this contract to the firm that it considers will provide the best overall program services. The City reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

6. Certification of Headquarters in Accordance with Administrative Code Chapter 12X.

Proposals should contain the following statement:

"I certify that my company is headquartered at the following address, _____ . I will notify the City if my company's headquarters moves."

IV. Evaluation and Selection Criteria

A. Minimum Qualifications

Any proposal that does not demonstrate that the proposer meets these minimum requirements may be considered non-responsive and may not be eligible for award of the contract.

1. The Proposer must provide Monitoring/Home Detention and Case Management Program as one service.
2. The Proposer must provide assurances that they are in good financial condition, and must have a demonstrated organization capability to administer public funds. (If required, Proposer will submit an independent audit or yearly financial statement.)
3. Proposers must have at least five (5) years of experience providing Electronic Monitoring Services and Case Management.
4. Proposer warrants the possession of all licenses and/or permits required by the laws and regulations of the United States, the State of California, and the City and County of San Francisco ("City") to provide services.
5. The Proposer must have a 24-hour technical support center that can be accessed by the SFSD 24 hours a day, seven (7) days a week, 365 days a year to provide a safety net of technical support during exigent and other circumstances.
6. The Proposer must attend the mandatory pre-bid conference on October 16, 2018.
7. Active GPS must collect a tracking point at least once every thirty (30) seconds, and must report information via the cellular network at least once every three (3) minutes and must report tampering and zone violations immediately. Devices proposed for Active GPS that utilize less frequent intervals shall be rejected and not evaluated.
8. The Proposer must have successfully administer a Monitoring/Home Detention and Case Management Program for an agency with a monthly participant count of 100 to 200.

Proposals should clearly demonstrate that the qualifications are met. Insufficient or incomplete information may result in a proposal being considered non-responsive and may not be eligible for award of the contract. If required information is complete, but the department determines that the proposer does not meet minimum qualifications, proposer may be deemed non-responsive.

B. Selection Criteria

The proposals will be evaluated by a selection committee comprised of parties with expertise in electronic monitoring and post-custody supervision. The evaluation process will consist of the phases specified below with the following allocation of points:

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

EVALUATION PHASE	MAXIMUM POINTS
Screening of Minimum Qualifications	Pass/Fail
Written Proposal	35 points
Price (Fee Proposal)	35 points
Oral Interview and Equipment Demonstration	30 points
TOTAL	100 points

All proposals will be scored on the same scale against the same objective criteria, with a maximum of 100 points.

C. Overall Evaluation Process

1. Screening of Minimum Qualifications

Each proposal will be reviewed for initial determinations on whether Proposer meets minimum qualifications referenced in Section IV.A of this RFP. Proposals will not be scored during the screening of Minimum Qualifications. This screening is simply a Pass or Fail determination as to whether the proposer has met the minimum qualifications. A proposal that fails to meet the minimum qualifications will not be eligible for consideration in the evaluation process. The City reserves the right to request clarifications from proposers prior to rejecting a proposal for failure to meet the minimum qualifications. Clarifications are limited to exchanges between the City and Proposer for clarifying certain aspects of the proposal and will not provide a proposer the opportunity to revise or modify its proposals. Only proposals that meet the minimum qualifications can proceed to the next evaluation phases.

2. Written Proposal Evaluation (Total of 35 points)

The proposals will be evaluated by a Selection Committee comprised of parties with expertise in the needed services. Each question will be scored on a scale of 0-5 according to the following parameters: Does not meet SFSD expectations (0-1); Meets SFSD Expectations (2-4); or Exceeds SFSD expectations (5). The City intends to evaluate the proposals generally in accordance with the criteria itemized below.

a. Project Approach: Case /Monitoring and Equipment (Total of 20 points)

Respondent will be graded on an understanding and reasonableness of the project and the tasks to be performed.

i. Project Approach: Case Management/Monitoring Services (15 points), Please address the following in your response:

- a) Proposer demonstrates ability to perform 24-hour, 35-day monitoring according to requirements described in the Scope of Work
- b) Proposer demonstrates ability to create and maintain electronic client files containing the required information

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

and to share that information easily and regularly with SFSD staff as described in Scope of Work.

c) Proposer demonstrates an ability to meet or exceed the Case Management Requirements as described in Scope of Work.

ii. Project Approach: Equipment (5 points) (Refer to Scope of Work, Section II. C, Equipment Requirement for more detail)

Please address the following criteria in your response:

a) Provision of electronic devices to SFSD staff with web-based interface.

b) Provision of all equipment and consumables, including maintenance and replacement of equipment

c) Provision of alternative location tracking and satisfaction of other criteria.

d) Proposer should reflect, line-by-line, the requirements requested in the Section II. C, Equipment Requirement.

b. Experience of Firm (Total of 10 points)

Firm qualifications should demonstrate an ability to meet or exceed the project as defined in the Scope of Work.

Please address the following in your response:

i. Expertise of the firm in the fields necessary to complete the tasks.

ii. Quality of recently completed projects, including adherence to schedules, deadlines, and budgets.

iii. Experience with similar projects.

c. Assigned Project Staff (Total of 5 points)

Team qualifications demonstrate an ability to meet or exceed the project as defined in the Scope of Work.

i. Recent experience of staff assigned to the project and a description of the tasks to be performed by each staff person.

ii. Professional qualifications and education.

iii. Workload, staff availability and accessibility.

3. Fee Proposal (Total of 35 points) (Refer to Appendix B, Fee Proposal)

The City intends to award this contract to the firm that it considers will provide the best overall services. The City reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

The Price Proposal score will be determined by the equation below and will be based on the total price proposal.

$$\text{Score} = (\text{Lowest Proposed Price} / \text{Proposer's Price}) \times (\text{Max Price points possible})$$

4. Oral Interview/Demonstration (30 points)

The interview will consist of either or both standard questions asked of each of the proposers, and may include questions of clarification for specific proposals. The selection panel will evaluate each proposer based on their presentation and/or responses. During the oral interview and demonstration, Proposers will answer five questions orally and give an in-person overview of each device, in front of the Selection Committee. The Oral Interview/Demonstration will be held on November 15, 2018 at 9:30 am PST at the SFSD Programs Office located at 70 Oak Grove, San Francisco, CA 94103.

The format and scoring criteria for the Oral Interview/Demonstration are as follows:

- a. Oral Presentation (program, equipment, support, responses to any additional questions and answers). 5 points
- b. Demonstration of the web-based interface (ability to see the navigation dashboard, report running capabilities, tracking capabilities, ease of use, etc.). 10 points
- c. Demonstration of live equipment (not necessarily how it functions but SFSD's ability to hold it, see how it affixes, etc.). 10 points
- d. Demonstration of reports (SFSD would like to see mock reports that are required in Section II. A. 5. g), Scope of work, Reports). 5 points

After the oral interview, the City will combine all scores, rank the proposers, and select the highest ranked proposer to enter into agreement with.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

V. Pre-proposal Conference and Contract award

A. Pre-Proposal Conference

Proposers must attend a mandatory pre-proposal conference on **October 16, 2018**, at **8:30 am** to be held at **1 Dr. Carlton B. Goodlett Place, City Hall – Room 421, San Francisco, CA 94102**. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please contact the individual designated in Section VI.B.

Question and Answer Period

Proposers shall submit all questions concerning this Request for Proposal in writing by email only during the Question and Answer Period, ending **October 18, 2018**, no later than **12:00 p.m.** PST and directed to: **Henry.Gong@sfgov.org**. Questions and Answers will be posted publically as Addendums to the RFP. Please reference RFP#: SHF2019-01/Event ID 0000001210.

The Pre-Proposal Conference will begin at the time specified, and company representatives are urged to arrive on time. Topics already covered will not be repeated for the benefit of late arrivals. Failure to attend the Pre-bid Conference shall not excuse the successful Proposer from any obligations of the contract. Written Bid Addendum will execute any change or addition to the requirements contained in this RFP, as a result of the Pre-Proposal Conference. It is the responsibility of the Proposer to check for any RFP Addendums, Q&A postings, and other updates which will be posted on the City's Supplier Portal website:

<https://sfsupplierportal.sfgov.org/psp/supplier/SUPPLIER/ERP/h/?tab=DEFAULT>

B. Contract Award

The **Sheriff's Department** will select a proposer with whom the **Sheriff's Department** staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time the **Sheriff's Department**, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin contract negotiations with the next highest ranked proposer.

VI. Terms and Conditions for Receipt of Proposals

A. Errors and Omissions in RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the Department, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the Department promptly after discovery, but in no event later than 72 hours prior to the date that proposals are due. Modifications and clarifications will be made by addenda as provided below.

B. Inquiries Regarding RFP

Proposers shall submit all questions concerning this Contract Proposal, scope of services or requirements in writing by email only during the Question and Answer Period, ending **October 18, 2018** no later than **12:00 p.m. PST** and directed to: Henry.Gong@sfgov.org. All Proposer questions concerning the bid process shall be submitted no later than 72 hours prior to the bid deadline of **November 5, 2018 at 2:00 p.m. PST**. Proposers who fail to do so will waive all further rights to protest, based on these specifications and conditions.

All notifications will receive a response in the City's Supplier Portal website as an Addendum to the RFP SHF2019-01/ Event ID 0000001210.

C. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not less than 72 hours prior to the RFP deadline, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

D. Change Notices

The Department may modify the RFP, prior to the proposal due date, by issuing an Addendum to the RFP, which will be posted on the website. The proposer shall be responsible for ensuring that its proposal reflects any and all Bid Addendum(s) issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the proposer consult the website frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Bid Addendum(s). It is the responsibility of the proposer to check for any Addendum, Questions and Answers, and updates, which will be posted on the City's Supplier Portal website:

<https://sfsupplierportal.sfgov.org/psp/supplier/SUPPLIER/ERP/h/?tab=DEFAULT>

Please note that this solicitation will be carried out through the City's new PeopleSoft Supplier Portal. Please locate this solicitation on the PeopleSoft Supplier Portal under Event ID 0000001210, Event Name SHF2019-01 Electronic Monitoring and Case Management Program. The Supplier Portal is located at:

<https://sfsupplierportal.sfgov.org/psp/supplier/SUPPLIER/ERP/h/?tab=DEFAULT>

All solicitation document downloads and bids submissions will be done through the Supplier Portal. In order to submit a bid: Bidders must register as a Sourcing Bidder in the PeopleSoft system. Go to the PeopleSoft Supplier Portal to find solicitations. For more information about the Supplier Portal, visit our SF City Partner website at: <https://sfcitypartner.sfgov.org/> If you

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

experience any issues please email sfcitypartnersupport@sfgov.org or call the Supplier Support Desk at 415-944-2442, Ext 1 during normal business hours from 9:00 AM to 5:00 PM.

E. Term of Proposal

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

F. Revision of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before, but no later than the proposal due date and time.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.

At any time during the proposal evaluation process, the Department may require a proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

G. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

H. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the City and may be used by the City in any way deemed appropriate.

I. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the proposer is prohibited from making contributions to:

- the officer's re-election campaign
- a candidate for that officer's office
- a committee controlled by the officer or candidate.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

1. **Criminal.** Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. **Civil.** Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. **Administrative.** Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

J. Sunshine Ordinance

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

K. Public Access to Meetings and Records

If a proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the proposer must comply with Chapter 12L. The proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to proposer's meetings and records, and (2) a summary of all complaints concerning the proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

L. Reservations of Rights by the City

The issuance of this RFP does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFP by any other means; or
6. Determine that no project will be pursued.

M. No Waiver

No waiver by the City of any provision of this RFP shall be implied from any failure by the City to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

N. Local Business Enterprise Goals and Outreach

The requirements of the Local Business Enterprise and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code as it now exists or as it may be amended in the future (collectively the "LBE Ordinance") shall apply to this RFP.

Each solicitation process requires a **new submittal of CMD Attachment 3 forms** at the following link, located under the heading "Attachment 3: General Services Contracts":

<http://www.sfgsa.org/index.aspx?page=6135>

- (1) Form 2A-CMD Contract Participation Form
- (2) Form 2B- CMD "Good Faith Outreach" Requirements Form
- (3) Form 3- CMD Non-Discrimination Affidavit
- (4) Form 4- CMD Joint Venture Form (if applicable), and
- (5) Form 5- CMD Employment Form

Please submit Forms 2A, 2B, 3 and 5 (and Form 4 if Joint Venture response) with your Response Package. The forms should be part of the "Original" of your response. The forms should have original signatures.

If these forms are not returned with the response, the response may be determined to be non-responsive and may be rejected.

1. Local Business Enterprise Goals and Outreach

The requirements of the Local Business Enterprise (LBE) and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the S.F. Administrative

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Code as it now exists or as it may be amended in the future (collectively the "LBE Ordinance") shall apply to this solicitation. More information regarding these requirements can be found at:

<http://www.sfgov.org/cmd>

2. LBE Sub-consultant Participation Requirement

Please refer to San Francisco Administrative Code Chapter 14B and *CMD Attachment 2* for information concerning the City's LBE program.

The LBE sub-consulting goal is 0 % of the total value of the goods and/or services to be procured. Sub-consulting goals can only be met with CMD-certified Small or Micro-LBEs located in San Francisco.

3. Link to LBE Sub-consultant Directory

This link takes you to a directory of current Local Business Enterprises.

http://mission.sfgov.org/hrc_certification/

4. Good Faith Outreach to Select LBE Sub-consultants

Each firm responding to this solicitation shall demonstrate in its response that it has used good-faith outreach to select LBE sub-consultants as set forth in S.F. Administrative Code §§14B.8 and 14B.9, and shall identify the particular LBE sub-consultants solicited and selected to be used in performing the contract. For each LBE identified as a subcontractor, the response must specify the value of the participation as a percentage of the total value of the goods and/or services to be procured, the type of work to be performed, and such information as may reasonably be required to determine the responsiveness of the response. LBEs identified as sub-consultants must be certified with the Contract Monitoring Division at the time the response is due, and must have been contacted by the (prime contractor) prior to listing them as subcontractors in the response. Any response that does not meet the requirements of this paragraph will be non-responsive.

5. Documentation of Good Faith Outreach Efforts

In addition to demonstrating that it will achieve the level of sub-consulting participation required by the contract, a Respondent shall also undertake and document in its submittal the good faith efforts required by Chapter 14B.8(C) & (D) and *CMD Attachment 2, Requirements for Architecture, Engineering and Professional Services Contracts*.

Responses which fail to comply with the material requirements of S.F. Administrative Code §§14B.8 and 14B.9, *CMD Attachment 2* and this solicitation will be deemed non-responsive and will be rejected. During the term of the contract, any failure to comply with the level of LBE sub-consultant participation specified in the contract shall be deemed a material breach of contract.

Note: If Respondent meets/exceeds LBE participation by 35% (i.e. 31.05% LBE participation for this contract), Good Faith Outreach documentation is not required.

6. LBE Participation and Rating Bonuses

The City strongly encourages responses from qualified LBEs. Pursuant to Chapter 14B, the following rating bonuses will be in effect for the award of this project for any

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Respondents who are certified as a Small or Micro-LBE, or joint ventures where the joint venture partners are in the same discipline and have the specific levels of participation as identified below. Certification applications may be obtained by calling (415) 581-2310. The rating bonus applies at each phase of the selection process. The application of the rating bonus is as follows:

- a) A 10% bonus to a Small or Micro LBE—including Non-Profit; or a joint venture between or among LBEs; or
- b) A 5% bonus to a joint venture with LBE participation that equals or exceeds 35%, but is under 40%;
- c) A 7.5% bonus to a joint venture with LBE participation that equals or exceeds 40%;

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

7. Application of the Rating bonus:

The following rating bonus shall apply at each stage of the selection process, i.e., qualifications, proposals, and interviews:

- a) Contracts with an Estimated Cost in Excess of \$10,000 and Less Than or Equal To \$400,000. A 10% rating bonus will apply to any proposal submitted by a CMD certified Small or Micro LBE. Proposals submitted by SBA-LBEs are not eligible for a rating bonus.
- b) Contracts with an Estimated Cost in Excess of \$400,000 and Less Than or Equal To \$10,000,000. A 10% rating bonus will apply to any proposal submitted by a CMD certified Small or Micro-LBE. Pursuant to Section 14B.7(E), a 5% rating bonus will be applied to any proposal from an SBA-LBE, except that the 5% rating bonus shall not be applied at any stage if it would adversely affect a Small or Micro-LBE proposer or a JV with LBE participation.
- c) Contracts with an Estimated Cost In Excess of \$10,000,000 and Less Than or Equal To \$20,000,000. A 2% rating bonus will apply to any proposal submitted by a Small LBE, Micro LBE and SBA-LBE.
- d) The rating bonus for a Joint Venture ("JV") with LBE participation that meets the requirements of Section 2.02 below is as follows for contracts with an estimated cost of in excess of \$10,000 and Less Than or Equal to \$10,000,000:
 - i. 10% for each JV among Small and/or Micro LBE prime proposers.
 - ii. 5% for each JV which includes at least 35% (but less than 40%) participation by Small and/or Micro-LBE prime proposers.
 - iii. 7.5% for each JV that includes 40% or more in participation by Small and/or Micro-LBE prime proposers.
 - iv. The rating bonus will be applied by adding 5%, 7.5%, or 10% (as applicable) to the score of each firm eligible for a bonus for purposes of determining the highest ranked firm. Pursuant to Chapter 14B.7(F), SBA-LBEs are not eligible for the rating bonus when joint venturing with a non LBE firm. However, if the SBA-

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

LBE joint ventures with a Micro-LBE or a Small-LBE, the joint venture will be entitled to the joint venture rating bonus only to the extent of the Micro-LBE or Small-LBE participation described in Section 2.01B.4b. and c. above.

- e) The rating bonus does not apply for contracts estimated by the Contract Awarding Authority to exceed \$20 million.

The rating bonus/bid discount does not apply for contracts estimated by the Contract Awarding Authority to exceed \$20 million.

8. CMD Contact

If you have any questions concerning the CMD Forms and to ensure that your response is not rejected for failing to comply with S.F. Administrative Code Chapter 14B requirements, please call Lupe Arreola, the CMD Contract Compliance Officer for this solicitation at (415) 558-4059 or by e-mail at lupe.arreola@sfgov.org; or the main CMD phone number (415) 581-2310. The forms will be reviewed prior to the evaluation process.

VII. Contract Requirements

A. Standard Contract Provisions

The successful proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as Appendix B. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

B. Nondiscrimination in Contracts and Benefits

The successful proposer will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available on the CMD's website at <http://sfgov.org/cmd/>.

C. Minimum Compensation Ordinance (MCO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in S.F. Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements. For the amount of hourly gross compensation currently required under the MCO, see www.sfgov.org/olse/mco. Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract.

Additional information regarding the MCO is available on the web at www.sfgov.org/olse/mco.

D. Health Care Accountability Ordinance (HCAO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Health Care Accountability Ordinance (HCAO), as set forth in S.F. Administrative Code Chapter 12Q. Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the HCAO is available on the web at www.sfgov.org/olse/hcao.

E. First Source Hiring Program (FSHP)

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at <http://oewd.org/first-source> and from the First Source Hiring Administrator, (415) 701-4848.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

F. Conflicts of Interest

The successful proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful proposer that the City has selected the proposer.

VIII. Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Non-Responsible Determination

Within five working days of the City's issuance of a notice of a determination of non-responsibility, a vendor that would otherwise be the lowest responsive proposer may submit a written notice of protest. The vendor will be notified of any evidence reflecting upon their responsibility received from others or adduced as a result of independent investigation. The vendor will be afforded an opportunity to rebut such adverse evidence, and will be permitted to present evidence that they are qualified to perform the contract. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsibility. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

C. Protest of Contract Award

Within five working days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

D. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

San Francisco Sheriff's Department
Attn: Henry Gong
1 Dr. Carlton B. Goodlett Place, Room 456
Henry.Gong@sfgov.org

Please reference RFP No. _SHF2019-01.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Appendix A

Standard Forms

A. How to become Eligible to Do Business with the City:

Before the City can award any award any contract to a contractor, all vendors must meet the minimum requirements described below. There may be additional requirements placed upon a vendor depending on the type of good or service to be purchased.

B. Mandatory Forms:

At a minimum, in order to become eligible to do business with the City, a vendor must submit the following documents to the Vendor Support Division via the City’s supplier portal located at <https://sfcitypartner.sfgov.org/> :

1. Vendor Application Packet (includes *New Vendor Number Request Form* and *IRS Form W-9*)
2. CCSF Vendor - Business Registration (Electronic Submission - you must have a vendor number to complete)
3. CMD 12B-101 Declaration of Nondiscrimination in Contracts and Benefits

C. Vendor Eligibility and Invoice Payment:

Vendors must have a City-issued vendor number, have all compliance paperwork submitted and approved by the City, and have an executed contract or purchase order before payments can be made. Once a vendor number has been assigned, an email notification will be provided by the City's Vendor File Support Division. This notification will include instructions on how to sign up to receive payments through the City's supplier portal located at <https://sfcitypartner.sfgov.org/> .

D. Vendor Eligibility Forms:

<u>Form</u>	<u>Purpose/Info</u>	<u>Routing</u>
<u>CCSF Vendor - Business Registration (Electronic Submission - you must have a vendor number to complete)</u>	This declaration is required for city vendors to determine if you are required to obtain a Business Registration Certificate.	https://sfcitypartner.sfgov.org/
<u>Declaration of Nondiscrimination in Contracts and Benefits with supporting documentation</u> (Form CMD-12B-101)	This Declaration is used by the City’s Contract Monitoring Division to determine if a vendor offers benefits to employees. When a vendor offers benefits, it must be verified that all benefits, including insurance plans and leaves, are offered equally to employees with spouses and employees with	https://sfcitypartner.sfgov.org/

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

	domestic partners. For more information and assistance, please visit the City Administrator's Contract Monitoring Division Equal Benefits web page.	
<u>Vendor Profile Application</u>	Includes New Vendor Number Request Form and IRS Form W-9.	https://sfcitypartner.sfgov.org/

E. Supplemental Forms:

Form:	Required If:
Minimum Compensation Ordinance (MCO) Declaration (pdf)	You have at least \$25,000 (\$50,000 for non-profit organizations) in cumulative annual business with a City department or departments and have more than 5 employees, including employees of any parent, subsidiaries and subcontractors.
Health Care Accountability Ordinance (HCAO) Declaration (pdf)	You have at least \$25,000 (\$50,000 for non-profit organizations) in cumulative annual business with a City department or departments and have more than 20 employees (more than 50 employees for nonprofit organizations), including employees of any parent, subsidiaries or subcontractors.
Insurance Requirements (pdf)	The solicitation requires the successful proposer to demonstrate proof of insurance.
Payment (Labor and Material) Bond (pdf)	The solicitation requires the awarded vendor to post a Payment (Labor and Material) bond.
Performance Bond (pdf)	The solicitation requires the awarded vendor to post a Performance bond.
Local Business Enterprise Program Application (Contract Monitoring Division)	You desire to participate in the City's Local Business Enterprise Program which helps certain financially disadvantaged businesses increase their ability to compete effectively for City contracts

For further guidance, refer to the City's supplier training videos that are located online at: <https://sfcitypartner.sfgov.org/>.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

Appendix B

Fee Proposal

A. Fee Proposal

Enter a single rate for each of the Monitoring Equipment listed in the table below under the "Rate" Column. Proposer should develop a rate to include all expenses related to the completion of services as detailed in the Scope of Work of RFP #SHF2019-01. Only items included in the Appendix B. A, items 1 to 12 - Fee Proposal will be used to score the Fee Proposal.

	Equipment Description	Unit of Measure	Proposed Price/Rate	Maximum Points
1)	Active GPS	Per Unit/Day	\$	6
2)	Additional Cost per GPS device for High Scrutiny Monitoring (per Appendix A - Section II.A.5.e)	Per Unit/Day	\$	6
3)	Home Monitoring Unit (HMU) – Landline	Per Unit/Day	\$	2
4)	Home Monitoring Unit (HMU) – Cellular	Per Unit/Day	\$	2
5)	Mobile Breath Alcohol Testing	Per Unit/Day	\$	1
6)	Continuous Alcohol Monitoring (CAM) Landline	Per Unit/Day	\$	1
7)	Continuous Alcohol Monitoring (CAM) Cellular	Per Unit/Day	\$	5
8)	Continuous Alcohol Monitoring (CAM) Ethernet	Per Unit/Day	\$	2
9)	Continuous Alcohol Monitoring (CAM) Wifi	Per Unit/Day	\$	2
10)	Active GPS bundled with Continuous Alcohol Monitoring (CAM)	Per Unit/Day	\$	4
11)	Volume Discount on Active GPS Device used in excess of 50 devices	% of Discount on per unit/day rate	%	2
12)	Volume Discount on CAM Cellular Device used in excess of 50 devices	% of Discount on per unit/day rate	%	2
	TOTAL POINTS			35

B. Each Proposer shall provide the following supporting details, on a separate sheet, to show how it arrived at their fee proposal.

1. Hourly rates for all team members. Hourly rates and itemized costs may be used to negotiate changes in the Scope of Work if necessary.
2. Per unit cost for each type of Electronic Monitoring equipment.
3. List of all service charges, per unit of service.

RFP SHF2019-01 for Electronic Monitoring Services and Case Management Program

****Please Note: Items B, 1 to 3 will NOT be included in the scoring, be may be used to negotiate the awarded contract.**



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

Sent via Electronic Mail

May 15, 2014

SCOTT R. HELDFOND
PRESIDENT

E. DENNIS NORMANDY
VICE PRESIDENT

DOUGLAS S. CHAN
COMMISSIONER

KATE FAVETTI
COMMISSIONER

GINA M. ROCCANOVA
COMMISSIONER

JENNIFER C. JOHNSTON
EXECUTIVE OFFICER

NOTICE OF CIVIL SERVICE COMMISSION ACTION

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS NUMBERS 43766-13/14; 42508-13/14; 42995-13/14; 45752-13/14; 48552-13/14; 4055-10/11; 4127-09/10; AND 48796-13/14.

At its meeting of May 5, 2014 the Civil Service Commission had for its consideration the above matter.

The Commission took the following actions:

1) Approved PSC #42508-13/14, with the condition that the Department of Public Health report back to the Executive Officer to confirm the classes that will be affected, and that notice is given to the appropriate union and that there is an accord. (Vote of 5 to 0)

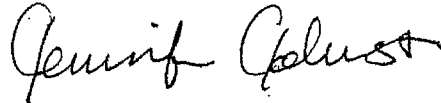
2) Approved PSC #45752-13/14, with the condition that the request to contract out is amended and resubmitted to reflect that the department's request is based on the fact that the services require special expertise, not because the hiring process takes too long. (Vote of 5 to 0)

3) PSC #4055-10/11 was continued to a future meeting so that the Port of San Francisco can repost the PSC request with an adequate description of the contract so that the average person can understand what is being considered, and with information on what training would be involved. (Vote of 5 to 0)

4) Approved the request for all remaining PSCs (PSC numbers 43766-13/14; 42995-13/14; 48552-13/14; 4127-09/10 and 48796-13/14): Adopted the report; notified the Office of the Controller and the Office of Contract Administration. (Vote of 5 to 0)

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

CIVIL SERVICE COMMISSION



JENNIFER JOHNSTON
Executive Officer

Attachment

Cc: Cynthia Avakian, Airport Commission
Henry Gong, San Francisco Sheriff's Department
Jacquie Hale, Department of Public Health
Lavena Holmes, San Francisco Port Commission
Shamica Jackson, Public Utilities Commission
Stacey Lo, Public Utilities Commission
Sean McFadden, Recreation & Park Department
Bree Mawhorter, San Francisco Sheriff's Department
Ben Rosenfield, Controller's Office
Jaci Fong, Contract Administrator
Commission File
Chron

Posting For May 5, 2014

Proposed Modifications to Personal Services Contracts

Node: Updated date

now -1 day

APPLY

Title	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
4055 10/11 - MODIFICATIONS	PORT - PRT	\$1,409,396	\$2,609,396	See attached 'Scope of Services and Project Summary.'	12/31/2014	12/31/2017	REGULAR
4127-09/10 - MODIFICATIONS	PUBLIC HEALTH - DPH	\$350,000	\$615,000	This modification will extend the PSC in order to cover the initial term of services that will be awarded as a result of the planned Requests for Proposals (RFPs). Approval is requested for five years, since the need for these as-needed, intermittent services is expected to continue and the Department expects funding to continue to be available. Contractors providing services under this PSC provide services to unique populations, including the many Tom Waddell Health Clinic patients who are often homeless, inmates of the County jail who may need services within the jails on-site, and residents of Laguna Honda Hospital requiring as-needed podiatry services who often are disabled and/or elderly.	07/01/2014	06/30/2021	REGULAR
48796 - 13/14 - MODIFICATIONS	SHERIFF - SHF	\$1,600,000	\$2,000,000	Services are needed to provide electronic home detention services and case management services for inmates who qualify for home detention as an alternative to incarceration. Services include adjunct case management to monitor inmate's outpatient participation in substance abuse or mental health programs and urinalysis to monitor sobriety.	04/01/2014	03/31/2019	REGULAR

TOTAL AMOUNT \$3,359,396

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request: Initial Modification of an existing PSC (PSC # 48796 - 13/14)

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

Type of Service: Electronic Monitoring and Home Detention

Funding Source: General Fund

PSC Original Approved Amount: \$400,000

PSC Original Approved Duration: 04/01/14 - 03/30/19 (4 years 52 weeks)

PSC Mod#1 Amount: \$1,600,000

PSC Mod#1 Duration: 04/01/14-04/30/19 (4 weeks 3 days)

PSC Cumulative Amount Proposed: \$2,000,000

PSC Cumulative Duration Proposed: 5 years 4 weeks

1. Description of Work

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

Services are needed to provide electronic home detention services and case management services for inmates who qualify for home detention as an alternative to incarceration. Services include adjunct case management to monitor inmate's outpatient participation in substance abuse or mental health programs and urinalysis to monitor sobriety.

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

This service is necessary so participants can return to their community with the opportunity for the Department to track their compliance with sentencing requirements. If this contract extension is denied, persons released to electronic monitoring would be removed from the program and returned to custody.

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.

Service performed under approved PSC 1002-09/10 and PSC 4125-11/12

D. Will the contract(s) be renewed?

The department issued RFP #1014-01 on October 16, 2013.

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

2. Reason(s) for the Request

A. Display all that apply

Services 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:
no response from department

B. Reason for the request for modification:

Revise PSC dollar amount. Initial PSC dollar amount of \$400K should have been noted as an annual amount. To extend the End Date by 30 days from 3/31/2019 to 4/30/2019.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor's staff must be trained and experienced in monitoring participants with proprietary electronic bracelets, alcohol testing and urinalysis. In addition, staff must be able to track participants on real-time digital maps, via proprietary specialized communication systems. Contractor's staff notifies sworn staff when participants violate the terms of their monitoring.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide electronic Global Positioning System bracelets, wearable alcohol monitoring devices and hand-held portable alcohol testing devices.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

No civil service class provides all the duties enumerated above. Further, the Sheriff's Department cannot accurately predict on a month-to-month basis how many inmates will qualify for electronic monitoring.

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, given the duties associated with the services, it would not be practical to adopt a civil service classification to combine electronic bracelet monitoring via specialized communication systems, with case management and alcohol testing services.

6. Additional Information

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

No.

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

Please see Memo upload for Form 1 Question 5B

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.

CSC approved PSC 48796-13/14 on March 3

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

Leaders in Community Alternatives will be working on this PSC.

7. **Union Notification:** On 02/27/18, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

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

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

Address: 1 Dr. Carlton Goodlett Place, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48796 - 13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

5/5/2014 Approval

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: Website Design/Administration & Search Engine Optimization

Funding Source: General Fund

PSC Duration: 4 years

PSC Amount: \$1,000,000

1. Description of Work

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

In order to modernize and improve responsiveness and user friendliness of the Department's websites, the contractor(s) will provide website design, Search Engine Optimization (SEO), administration, testing, training, and support services, which may also include development of website pages focused on e-commerce for the Department's Vital Records office (birth and death records).

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

The services are necessary in order for the Department to serve the public and its patients/consumers/clients effectively, and to be in compliance with Medicaid network adequacy requirements. The Centers for Medicare and Medicaid Services (CMS) require that local/county agencies have a modern website in order to present the many Behavioral Health Services program provided by the Department. If approval is denied, the Department will be unable to continue to provide access to information on its services to the public and its patients/consumers/clients effectively, which may contribute to delays in patients/clients/consumers receiving appropriate health care and related adverse treatment outcomes.

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

D. Will the contract(s) be renewed?

Only if there is funding and an ongoing need.

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

The services needed are needed on a short-term basis, while current civil service staff are needed to meet other Department needs including preparation and rollout of the new Electronic Health Record system.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Knowledge, expertise, and experience to provide the services needed for website design, Search Engine Optimization (SEO), administration, testing, training, and support services for the Department's websites. For WordPress sites, the contractor must have experience in responsive themes (such as Avada), must be able to effectively administer a WordPress site, must have sufficient knowledge and expertise in WordPress security standards and in website development tools.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 5504, Project Manager 2; 0931, Manager III;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: If required, the contractor may provide all of the technical back-end support to host website(s).

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

Currently, Department IT staff do not have the expertise or available resources to perform the requested services.

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

- A. Explain why civil service classes are not applicable.
The services needed are highly specialized and needed short-term, while current civil service staff are needed to meet other Department needs including preparation and rollout of the new Electronic Health Record 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. There are current civil service classifications with similar specifications, however, this is a short-term engagement requiring specialized expertise, and civil service classes are needed on other more long-term projects. Current staff will have the opportunity to work with contractor staff and learn up-to-date skills needed to administer and develop a WordPress site, work with responsive WordPress themes, and up-to-date SEO techniques.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. Yes. Training may include Business and Programmer Analysts (classifications 1051, 1052, 1053, 1054, and 1063) as well as management staff (classifications 1044, 5504, 0931) who may have the opportunity to train on the day-to-day maintenance of the contractor-created website(s).

- 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 11/21/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Municipal Executive Association; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP

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

Name: 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# 40844 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

Hale, Jacquie (DPH)

From: dhr-psccordinator@sfgov.org on behalf of jacquie.hale@sfdph.org
Sent: Wednesday, November 21, 2018 3:32 PM
To: Hale, Jacquie (DPH); amakayan@ifpte21.org; Christina@sfmea.com; staff@sfmea.com; Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; LokUng, Muki (DPH); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40844 - 18/19

RECEIPT for Union Notification for PSC 40844 - 18/19 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 40844 - 18/19 for \$1,000,000 for Initial Request services for the period 01/01/2019 – 12/31/2022. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12148> 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: Medical Credentialing-Privileging Software Hosting & Related Services

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$1,750,000

1. Description of Work

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

The contractor(s) will provide fully hosted, web-based software and its support to enable credentialing and privileging of medical services providers and employees for the Department of Public Health (DPH). Support will include project management, design, programming, testing, documentation, and system integration services.

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

In order to maintain compliance with federal and State regulations and continue receipt of funding, DPH is required to ensure that the medical services providers in its facilities and DPH employees who provide medical services and support have the proper credentials, are properly authorized or licensed to perform their duties, and are not excluded from participation in any programs which would affect their duties, including reimbursement programs such as Medi-Cal. DPH staff responsible for these critical duties require up-to-the-minute information and analysis of that is now typically provided through software. Denial will lead to being out of compliance and being unable to serve clients/patients, with resulting loss of revenue from federal and State reimbursements, requiring replacement by General Fund monies.

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

The Department currently has a legacy software solution for credentialing and privileging which is being replaced by an up to date web based, remotely hosted, system.

D. Will the contract(s) be renewed?

Yes, as the need for services continues.

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 first year will include phase implementation, testing, and on-going maintenance to ensure the solution is credentialing and privileging effectively. The initial rollout will be to credential and privilege network providers (doctors, nurses, physicians, etc.), other departments in Public Health (Human Resources, Administration, etc.) will be later added, so the additional time will be needed. This specialized solution will be needed ongoing as all staff will periodically be checked and rechecked.

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 contractor will provide a fully hosted (web-based) application. The contractor will provide all hardware and a secured location to host the application, as well as ongoing maintenance as support, on an as-needed basis.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Ability to provide a credentialing and privileging software application solution which is remotely hosted (web-based) and all system upgrades and maintenance. The application must be able to interface with all applications in use by the Department as needed, must follow all current Department network and application security protocols for protection and safeguarding of Personally Identifiable Information (PII), and as required, must also follow standard regulatory and security protocols to protect Protected Health Information (PHI). The application must seamlessly check numerous third party databases and lists to verify credentials and privileging rights, including exclusion status.

B. Which, if any, civil service class(es) normally perform(s) this work? 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1061, IS Program Analyst-Assistant; 1062, IS Programmer Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide a fully hosted (web-based) application. The contractor will provide all hardware and a secured location to host the application, as well as ongoing maintenance as support, on an as-needed basis.

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

It is not feasible for the Department to design and implement a fully functional and comprehensive remotely hosted credentialing and privileging application from inception to operation, i.e., "from scratch." Department IT staff will be trained on the new platform, and will monitor and provide as-needed support of the application to ensure that it meets all current and future Department specific requirements. In addition, Department staff will have the opportunity to learn current industry best practices in the provision of hosted applications.

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 it is not feasible for the Department to design and implement a fully functional and comprehensive remotely hosted credentialing and privileging application. The software needed is highly specialized and civil service classes do not possess the necessary resources to develop and provide ongoing support for a commercially available application since such ongoing support is typically provided by the manufacturer of the software in order to ensure compliance with all warranties and performance standards.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, due to the proprietary nature of the information systems and the specific knowledge required to bring this new technology to full production status in the DPH environment.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. City staff will have the opportunity to learn industry best practices in a given field and the use of the new application. Employees who may receive training would be varied depending on the specific project, and could include the IS Engineer series 1042, 1043, 1052, 1053, and Credentialing Analysts 2107 and Credentialing Specialist 2106 1054; Project Managers series 5502, 5504, 5506, and 5508; and Manager classifications 0923 and 0931
- 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 01/04/2019, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: 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# 42517 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of jacquie.hale@sfdph.org
To: [Hale, Jacquie \(DPH\); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; LokUng, Muki \(DPH\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Hale, Jacquie (DPH); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; LokUng, Muki (DPH); DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42517 - 18/19
Date: Friday, January 04, 2019 12:14:11 PM

RECEIPT for Union Notification for PSC 42517 - 18/19 more than \$100k .

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 42517 - 18/19 for \$1,750,000 for Initial Request services for the period 02/01/2019 – 01/31/2024. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/12405> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS

Dept. Code: TIS

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

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

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

Funding Source: General Fund

PSC Amount: \$500,000

PSC Est. Start Date: 04/01/2019 PSC Est. End Date 03/31/2021

1. Description of Work

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

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

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

A. Project Scope

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

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

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

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

This service was originally completed by New World Systems who has since been assumed by Tyler Technologies.

D. Will the contract(s) be renewed?

Yes, it is a possibility.

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

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

3. Description of Required Skills/Expertise

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

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

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

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

The resources are available in the City, however the vendor is the manufacturer of the software and the software is proprietary to the manufacturer.

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

A. Explain why civil service classes are not applicable.

The vendor is the manufacturer of the software and the software is proprietary to the manufacturer.

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

6. Additional Information

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

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not. Yes. Contractor shall provide System Administrative and Technical training to enable the City's IT staff to successfully configure and manage Offender360 JMS in their respective roles and responsibilities. a) Vendor will train up to eight (8) San Francisco Sheriff Department staff members b) Training will include four (4) two (2) day Workshops that will cover all necessary topics associated with IT Administrator Training for San Francisco Sheriff Department Staff to perform the following with assistance from Vendor. Additional training may be provided through web conferences if mutually agreed. c) Training Workshops will be conducted onsite at San Francisco Sheriff Department facilities to provide the following: i. Knowledge transfer, training, and documentation to allow in-house City IT staff to easily enhance and support the new system and technologies going forward; ii. Configure the JMS Booking module prototype to business requirements specification iii. Ability to update Prototype per San Francisco Sheriff Department stakeholder feedback. d) Vendor will provide all necessary training and classroom materials.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. **Union Notification:** On 10/22/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49622 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccoordinator@sfgov.org on behalf of jolie.gines@sfgov.org
To: [Gines, Jolie \(TIS\); Wanless, Annie \(HRD\); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; Gines, Jolie \(TIS\); DHR-PSCCoordinator.DHR \(HRD\)](mailto:Gines,Jolie(TIS);Wanless,Annie(HRD);ecassidy@ifpte21.org;WendyWong26@yahoo.com;wendywong26@yahoo.com;tmathews@ifpte21.org;kschumacher@ifpte21.org;kpage@ifpte21.org;eerbach@ifpte21.org;pkim@ifpte21.org;L21PSCReview@ifpte21.org;Gines,Jolie(TIS);DHR-PSCCoordinator.DHR(HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 49622 - 18/19
Date: Monday, October 22, 2018 4:29:19 PM

RECEIPT for Union Notification for PSC 49622 - 18/19 more than \$100k

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a request for a Personal Services Contract (PSC) 49622 - 18/19 for \$500,000 for Initial Request services for the period 04/01/2019 – 03/31/2021. 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/12096> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

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

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

Modification
Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT

Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 30382 - 17/18)

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

Type of Service: Consulting - Workforce Program Planning (One Stop Operator)

Funding Source: Fed Dept of Labor & Gen Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 01/01/18 - 06/30/20 (2 years 25 weeks)

PSC Mod#1 Amount: \$200,000 PSC Mod#1 Duration: 02/18/19-06/30/21 (1 year)

PSC Cumulative Amount Proposed: \$300,000 PSC Cumulative Duration Proposed: 3 years 25 weeks

1. Description of Work

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

The Office of Economic and Workforce Development (OEWD) is seeking to contract with an individual or firm that can serve as the department's One-Stop Operator (OSO), a lead coordinator of services delivered to San Francisco's workforce system. The workforce system is designed to establish services for a variety of San Francisco jobseekers that include unskilled, semi-skilled and high skilled individuals. The OSO will play a leadership role in coordinating the four (4) core mandated partners - the California Employment Development Department (EDD), California Department of Rehabilitation (DOR), City College of San Francisco (CCSF) Career Technical Education and Adult Education programs, and the San Francisco Human Services Agency (HSA)/Temporary Assistance for Needy Families (TANF) programs - and ensuring that appropriate services are delivered to customers through the workforce system. The role includes establishing Memorandums of Understanding (MOU) with the core partners, providing training and technical assistance and facilitating the successful implementation of services. Additional responsibilities may be determined by OEWD or suggested by the OSO or service providers to fulfill the OSO's role of system coordination and quality assurance.

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

The One Stop Operator (OSO) role was recently mandated under the federal Workforce Opportunity and Innovation Act (WIOA) and the department is required to begin planning and implementing OSO services within the 17-18 program year. If this request is denied, the department will not be able to deploy these services on time and risks violating the federal requirement.

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

Yes

D. Will the contract(s) be renewed?

Unknown at this time.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

This project is anticipated to be short-term and requires a broad complement of skills and expertise not currently available within the department. The coordinating functions are also best suited to an outside entity, to ensure that core partners are held accountable to the terms of their service agreements (MOUs).

B. Reason for the request for modification:

Increasing budget amount by \$200k and extending term by 1 year to cover additional service needs.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: In addition to general experience in stakeholder engagement and facilitation, the selected consultant should have verifiable expertise in the following areas: - Infrastructure for collection and analysis of real-time data from industry, educational partners, service providers, and the broader labor market. - Planning and design of system infrastructure that encourages stakeholder collaboration, experimentation, user feedback, and user/customer-centered design. - Identifying and prioritizing opportunities to improve the public workforce system. - Designing, developing, deploying, and evaluating workforce tools. - Developing workforce partnerships and collaborations. - Workforce Innovation and Opportunity Act regulation technical assistance, and other general workforce policy analysis and technical assistance.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This work is short-term and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, this work is anticipated to be short-term.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
The selected consultant will not train City employees, but will work as a liaison between the four core partners (EDD, DOR, CCSF, HSA) and OEWD staff, providing recommendations and technical consultation to OEWD as needed. The OEWD staff primarily tasked with overseeing the OSO's scope of work will be within the following classifications - 0931, 0923, 0922, 1824.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Yes - current contractor is expected to continue services.

7. Union Notification: On 01/15/19, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 30382 - 17/18

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 30382 - 17/18 - MODIFICATIONS

dhr-psccordinator@sfgov.org on behalf of marissa.bloom@sfgov.org

Tue 1/15/2019 5:31 PM

To: Bloom, Marissa (ECN) <marissa.bloom@sfgov.org>; ecassidy@ifpte21.org <ecassidy@ifpte21.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; pkim@ifpte21.org <pkim@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>;

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$200,000 for services for the period February 18, 2019 – June 30, 2021. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/12469>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECNDept. Code: ECNType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Consulting - Workforce Program Planning (One Stop Operator)Funding Source: Fed Dept of Labor & Gen FundPSC Duration: 2 years 25 weeksPSC Amount: \$100,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of Economic and Workforce Development (OEWD) is seeking to contract with an individual or firm that can serve as the department's One-Stop Operator (OSO), a lead coordinator of services delivered to San Francisco's workforce system. The workforce system is designed to establish services for a variety of San Francisco jobseekers that include unskilled, semi-skilled and high skilled individuals. The OSO will play a leadership role in coordinating the four (4) core mandated partners - the California Employment Development Department (EDD), California Department of Rehabilitation (DOR), City College of San Francisco (CCSF) Career Technical Education and Adult Education programs, and the San Francisco Human Services Agency (HSA)/Temporary Assistance for Needy Families (TANF) programs - and ensuring that appropriate services are delivered to customers through the workforce system. The role includes establishing Memorandums of Understanding (MOU) with the core partners, providing training and technical assistance and facilitating the successful implementation of services. Additional responsibilities may be determined by OEWD or suggested by the OSO or service providers to fulfill the OSO's role of system coordination and quality assurance.

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

The One Stop Operator (OSO) role was recently mandated under the federal Workforce Opportunity and Innovation Act (WIOA) and the department is required to begin planning and implementing OSO services within the 17-18 program year. If this request is denied, the department will not be able to deploy these services on time and risks violating the federal requirement.

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.
Not applicable - this is a new service.**D. Will the contract(s) be renewed?**
Unknown at this time.**E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.**
not applicable**2. Reason(s) for the Request****A. Indicate all that apply (be specific and attach any relevant supporting documents):** Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

B. Explain the qualifying circumstances:

This project is anticipated to be short-term and requires a broad complement of skills and expertise not currently available within the department. The coordinating functions are also best suited to an outside entity, to ensure that core partners are held accountable to the terms of their service agreements (MOUs).

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: In addition to general experience in stakeholder engagement and facilitation, the selected consultant should have verifiable expertise in the following areas: - Infrastructure for collection and analysis of real-time data from industry, educational partners, service providers, and the broader labor market. - Planning and design of system infrastructure that encourages stakeholder collaboration, experimentation, user feedback, and user/customer-centered design. - Identifying and prioritizing opportunities to improve the public workforce system. - Designing, developing, deploying, and evaluating workforce tools. - Developing workforce partnerships and collaborations. - Workforce Innovation and Opportunity Act regulation technical assistance, and other general workforce policy analysis and technical assistance.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is short-term and requires specific skills.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this work is anticipated to be short-term.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. The selected consultant will not train City employees, but will work as a liaison between the four core partners (EDD, DOR, CCSF, HSA) and OEWD staff, providing recommendations and technical consultation to OEWD as needed. The OEWD staff primarily tasked with overseeing the OSO's scope of work will be within the following classifications - 0931, 0923, 0922, 1824.
- 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 12/04/2017, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 30382 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 01/12/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS

Dept. Code: DPW

Type of Request: Initial Modification of an existing PSC (PSC # 43857 - 14/15)

Request:

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

Type of Service: As-Needed Acoustical Services

Funding Source: Inter-Departmental Work Orders

PSC Original Approved Amount: \$500,000

PSC Original Approved Duration: 12/08/14 - 06/30/18 (3 years 29 weeks)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 07/01/18-06/30/22 (4 years 1 day)

PSC Cumulative Amount Proposed: \$500,000

PSC Cumulative Duration Proposed: 7 years 29 weeks

1. Description of Work

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

Provide specialized services in Acoustical engineering to support DPW design staff on an as-needed basis. The City intends to award two (2) contracts for \$250,000 each, and contract duration of two (2) years each.

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

Acoustical engineering is a specialized professional service that is out of the Building, Design & Construction's (BDC) area of expertise. Acoustical engineers are specialized consultants who are experts in the area of acoustical analysis and engineering. This is a specialty which cannot be done in-house and must be outsourced. Having the ability to work with our own acoustical engineering consultants directly will save the city money and allow us to execute these contracts more efficiently... (please see attachment for full response)

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, please see PSC Modification history above.

D. Will the contract(s) be renewed?

No, there are currently no plans to renew the contract at this time.

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

N/A - PSC duration does not exceed 5 years.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

These services are only required when needed by the projects and when staff are not available due to high workload.

B. Reason for the request for modification:

This Mod Request is to increase contracting capacity in existing master agreements for as-needed acoustical services, and extend the PSC duration to match the awarded master agreements. Due to delays in advertising and awarding the contracts, one of the master agreements has an end date of 4/16/2022. These as-needed contracts are necessary to support Public Works on special projects that require expertise that are not provided by staff, and when the staff cannot meet project demands due to heavy work load.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Acoustical engineers are specialized consultants who are experts in the area of acoustical analysis and engineering. Consultant must have been in business for a minimum of 5 years performing acoustical engineering, and must provide a minimum of 5 sample projects involving acoustical engineering in the last 5 years.

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 contractor will not be providing facilities and/or equipment.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

These are as-needed contract services only. They will only be utilized when the following conditions exist: • Project requires specialized acoustical engineering services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The services are only going to be utilized on an as-needed basis and there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

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.

(please see attachment for full response)

- 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 01/23/19, 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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43857 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: Burns, Alexander (DPW)
To: Macaranas, Belle (DPW)
Subject: FW: Receipt of Modification Request to PSC # 43857 - 14/15 - MODIFICATIONS
Date: Wednesday, January 23, 2019 9:44:49 AM

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

From: dhr-psccoordinator@sfgov.org [<mailto:dhr-psccoordinator@sfgov.org>] On Behalf Of alexander.burns@sfdpw.org

Sent: Wednesday, January 23, 2019 9:36 AM

To: Burns, Alexander (DPW) <alexander.burns@sfdpw.org>; Wanless, Annie (HRD) <annie.wanless@sfgov.org>; kcartermartinez@cirseiu.org; ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC) <kbasconcillo@sfwater.org>; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@Local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA) <sin.yee.poon@sfgov.org>; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@Local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Macaranas, Belle (DPW) <belle.macaranas@sfdpw.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccoordinator@sfgov.org>
Subject: Receipt of Modification Request to PSC # 43857 - 14/15 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1, 2018 – June 30, 2022. 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/12416>

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

Additional Attachment(s)



London N. Breed
Mayor

Mohammed Nuru
Director

Division of Contract Administration
1155 Market Street, 4th Floor
San Francisco, CA 94103
(415) 554-4886 · www.sfdpw.org

Bruce Robertson, Finance Manager

PERSONAL SERVICES CONTRACT SUMMARY Modification Request

January 4, 2019

PSC No. 43857-14/15

Approved on: 2/2/2015

Description: As-Needed Acoustical Services

Amount:	Duration:	Type of Approval (DHR or CSC):
Original Approved Amount: \$500,000	Original Approved Duration: 12/8/14 – 6/30/18	CSC
Modification #1 Amount: N/A	Modification #1 of Duration: 7/1/18 – 6/30/22	
Total Modified Amount: \$500,000	Total Modified Duration: 12/8/14 – 6/30/22 (8 years, 11 months, 30 days)	

Reason for the modification:

This Mod Request is to increase contracting capacity in existing master agreements for as-needed acoustical services, and extend the PSC duration to match the awarded master agreements. Due to delays in advertising and awarding the contracts, one of the master agreements has an end date of 4/16/2022. These as-needed contracts are necessary to support Public Works on special projects that require expertise that are not provided by staff, and when the staff cannot meet project demands due to heavy work load.

If the request is for 5 years or more, please provide explanation:

Has this service been approved in the past:

Yes, please see PSC Modification history above.

Will the proposed work be completed by a contractor that has a current PSC? If "yes" please include an explanation:

No.

Scope change (please leave blank if there is no change):

Has the department requested additional staff to meet this ongoing requirement for service?

No. Acoustical engineering is a highly specialized field.

If not, is the Department willing to hire additional staff to create the capacity to do this work?

No. This service is only needed when the project involves sound engineering and design.

Additional Information to include with PSC Form 1 – PSC# 43857 - 14/15

Service: As-Needed Acoustical Services

- 1.B.** *Acoustical engineering is a specialized professional service that is out of the Building, Design & Construction's (BDC) area of expertise. Acoustical engineers are specialized consultants who are experts in the area of acoustical analysis and engineering. This is a specialty which cannot be done in-house and must be outsourced. Having the ability to work with our own acoustical engineering consultants directly will save the city money and allow us to execute these contracts more efficiently. If these services are denied, Public Works would need to continue to utilize these sub-consultant services through our As-Needed contracts and pay additional administrative fees (i.e. sub-consultant mark up). This would result in delays to critical projects to meet timelines as well.*
- 1.C.** *Acoustical engineering services for building projects have been provided through sub-consultants under the as-needed Architectural contracts. This proposed contract will allow BDC to have a dedicated prime consultant to provide acoustical engineering services. The most recent approved PSC for as-needed architectural contract is PSC No. 4095-09/10. Please also refer to our previous As-Needed Architectural Services RFQ, attached.*
- 5.B.** *No, training will not be provided for this service, as this would require the City to hire an individual with this specialized background. This service will only be utilized on an as-needed basis so there is no ongoing demand to justify the hiring of permanent City staff.*

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPWDept. Code: DPWType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: As-Needed Acoustical ServicesFunding Source: Inter-Departmental Work OrdersPSC Amount: \$500,000PSC Est. Start Date: 12/08/2014PSC Est. End Date: 06/30/2018**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Provide specialized services in Acoustical engineering to support DPW design staff on an as-needed basis. The City intends to award two (2) contracts for \$250,000 each, and contract duration of two (2) years each.

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

Acoustical engineering is a specialized professional service that is out of the Building, Design & Construction's (BDC) area of expertise. Acoustical engineers are specialized consultants who are experts in the area of acoustical analysis and engineering. This is a specialty which cannot be done in-house and must be outsourced. Having the ability to work with our own acoustical engineering consultants directly will save the city money and allow us to execute these contracts more efficiently... (please see attachment for full response)

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.

Acoustical engineering services for building projects have been provided through subconsultants under the as-needed Architectural contracts. This proposed contract will allow BDC to have a dedicated prime consultant to provide acoustical engineering services. The most recent approved PSC for as-needed architectural... (please see attachment for full response)

D. Will the contract(s) be renewed?

No, there are currently no plans to renew the contract at this time.

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

N/A - PSC duration does not exceed 5 years.

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

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

B. Explain the qualifying circumstances:

These services are only required when needed by the projects and when staff are not available due to high workload.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Acoustical engineers are specialized consultants who are experts in the area of acoustical analysis and engineering. Consultant must have been in business for a minimum of 5 years performing acoustical engineering, and must provide a minimum of 5 sample projects involving acoustical engineering in the last 5 years.
- 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 contractor will not be providing facilities and/or equipment.

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

We currently don't have professional Acoustical Engineers available in our departments. When a project requires this specialized field, we have had to seek qualified professionals through our As-Needed Architectural Services contracts.

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

- A. Explain why civil service classes are not applicable.
These are as-needed contract services only. They will only be utilized when the following conditions exist:
- Project requires specialized acoustical engineering services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The services are only going to be utilized on an as-needed basis and there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

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. (please see attachment for full response)
- 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 12/08/2014, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Sung Kim Phone: 650-821-2026 Email: sung.kim@flysfo.com

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43857 - 14/15

DHR Analysis/Recommendation:

action date: 02/02/2015

Commission Approval Required

Approved by Civil Service Commission

02/02/2015 DHR Approved for 02/02/2015

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 47395 - 17/18)

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

Type of Service: Engineering Services for Sunol Valley Water Treatment Plant Long Term Taste & Odor (PRO.0120)

Funding Source: Capital Funding

PSC Original Approved Amount: \$8,000,000

PSC Original Approved Duration: 12/01/18 - 12/01/24 (6 years 2 days)

PSC Mod#1 Amount: \$11,500,000

PSC Mod#1 Duration: 10/01/19-10/01/26 (1 year 43 weeks)

PSC Cumulative Amount Proposed: \$19,500,000

PSC Cumulative Duration Proposed: 7 years 43 weeks

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC) intends to award a \$8 million agreement to support SFPUC civil, structural, electrical, process, mechanical engineering staff, and for other specialized engineering services needed to assist in the design and support during construction of a new raw water ozonation system at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues. Design scope includes new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, associated piping/appurtenances, associated automatic controls (I&C), related facilities, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load. The Sunol valley power supply and usage will need to be analyzed and upgraded at San Antonio Pump Station and the Calaveras Substation to accommodate the new plant power loads. The contract will also address identified plant process limitations and make modifications to improve the plant reliability.

Scope Change

The San Francisco Public Utilities Commission (SFPUC) intends to award a \$19.5 million agreement to support SFPUC civil, structural, electrical; process, mechanical, and other specialized engineering services in the design and support during construction of a new raw water ozonation system, flocculant aid polymer system, and various needed upgrades at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues and plant reliability. The scope also includes an upgrade to the Calaveras high voltage substation to accommodate increasing power needs brought on by the new ozonation system and solar panels at the SVWTP to offset the large ozonation power demand. Major plant upgrades include new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, backup power facilities, polymer mixing skids, polymer aging tanks, transfer pumps, polymer building, associated piping/appurtenances, and associated automatic controls (I&C).

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

SFPUC is working on the Water System Improvement Program (WSIP), Sewer System Improvement Program (SSIP) and Capital Improvement Program (CIP). The engineering workload has substantially increased and consultants are needed to meet peak workload demands for planning and engineering design and construction support services on projects. This project requires special expertise in water treatment plant design and in particular, the raw water ozonation system, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and the need to have a long-term taste and odor system in place. If these services are not available, the project will not be completed to the highest quality and meet the project schedule. There is substantially more work than can be completed with in-house engineers within the planned schedule. Also, some of the services require expertise which is not available from City employees.

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.

Previous similar contracts include Agreement No. CS-879 (Engineering Project Design Services) for the Water System Improvement Program projects. The PSC No. for this Agreement is 4004-07/08.

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:

A project of this magnitude and complexity requires a six-year contract. The design phase will be 1.5 years and includes 35, 65, 95 and 100% design milestones with presentations at each milestone, preparation of Civic Design Review documents, engineer's estimates and construction schedules and documents needed for the California Environmental Quality Act (CEQA) process. The bid and award phase will be .5 years and includes addendum preparation, review of Question of Bid Documents (QBD's), review of bids and participation in preconstruction meetings and activities. The construction phase will be 2.5 years and includes construction support services, review of Requests for Information (RFI), Submittals and Requests for Substitutions, attend weekly construction meetings, attend site visits, prepare designs related to change orders or RFI's, and preparation of an Operations and Maintenance (O&M) plan for the facility. The closeout phase will be .5 years and will include review of closeout documents, preparation of as-built Computer-Aided Design (CAD) drawings and closeout reports. In the event there are design or construction delays and/or follow-up sub projects, consultant services will be needed for design and construction support work, pushing the duration past the 5 year mark.

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:

This project requires special expertise in water treatment plant design and the ozonation process, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and need to have taste and odor control systems installed prior to the shutdowns.

B. Reason for the request for modification:

This PSC is being modified because there were challenges with the Ozone design RFP. Thus, the scope, budget and schedule changed.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Experienced professional engineers in the structural, electrical, power, process, mechanical and civil disciplines during the design and construction phases of the new raw water ozonation system and SVWTP improvements are needed. Areas of specialized engineering experience, such as ozonation and high voltage systems, are required. In addition, process modifications downstream of the raw water ozonation process requires expertise in water treatment. Design support services during the construction phase are needed to review RFI's, RFS' and Submittals, address design changes and prepare operations and maintenance plans and CAD drawings.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This project requires special expertise in water treatment plant design, which is not available from City employees.
- 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's not practical. Engineers are needed to perform engineering design for projects, but this level of resources is not a long-term need that warrants hiring personnel. In addition, specialized engineering is also required which is not normally needed for projects and hiring individuals for these specialized areas is not feasible.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The Ozone process is a specialized system. In-house engineering staff will gain valuable knowledge and experience on this project. In addition to the knowledge transfer that will be provided as a result of working closely with the award firm, the consultant will also provide brown bag lunch presentations (one-hour each) throughout the term of the project. The target audience will be Water Enterprise, EMB and PMB staff. Planned topics will include in depth presentations on

treatment technologies, facility operation and start-up, BIM, and/or lessons learned. These topics will benefit both the team directly assigned to the project, as well as additional staff across multiple departments.

- 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 01/25/19, 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: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sfwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47395 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 03/04/2019

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org
To: Jackson, Shamica; amakayan@ifpte21.org; annie.wanless@sfgov.org; ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 47395 - 17/18 - MODIFICATIONS
Date: Friday, January 25, 2019 5:12:43 PM

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 \$11,500,000 for services for the period October 1, 2019 – October 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/12511>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUCDept. Code: PUCType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Engineering Services for Sunol Valley Water Treatment Plant Long Term Taste & Odor (PRO.0120)Funding Source: Capital FundingPSC Duration: 6 years 2 daysPSC Amount: \$8,000,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The San Francisco Public Utilities Commission (SFPUC) intends to award a \$8 million agreement to support SFPUC civil, structural, electrical, process, mechanical engineering staff, and for other specialized engineering services needed to assist in the design and support during construction of a new raw water ozonation system at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues. Design scope includes new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, associated piping/appurtenances, associated automatic controls (I&C), related facilities, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load. The Sunol valley power supply and usage will need to be analyzed and upgraded at San Antonio Pump Station and the Calaveras Substation to accommodate the new plant power loads. The contract will also address identified plant process limitations and make modifications to improve the plant reliability.

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

SFPUC is working on the Water System Improvement Program (WSIP), Sewer System Improvement Program (SSIP) and Capital Improvement Program (CIP). The engineering workload has substantially increased and consultants are needed to meet peak workload demands for planning and engineering design and construction support services on projects. This project requires special expertise in water treatment plant design and in particular, the raw water ozonation system, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and the need to have a long-term taste and odor system in place. If these services are not available, the project will not be completed to the highest quality and meet the project schedule. There is substantially more work than can be completed with in-house engineers within the planned schedule. Also, some of the services require expertise which is not available from City employees.

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.

Previous similar contracts include Agreement No. CS-879 (Engineering Project Design Services) for the Water System Improvement Program projects. The PSC No. for this Agreement is 4004-07/08.

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.

A project of this magnitude and complexity requires a six-year contract. The design phase will be 1.5 years and includes 35, 65, 95 and 100% design milestones with presentations at each milestone, preparation of Civic Design Review documents, engineer's estimates and construction schedules and documents needed for the California Environmental Quality Act (CEQA) process. The bid and award phase will be .5 years and includes addendum preparation, review of Question of Bid Documents (QBD's), review of bids and participation in preconstruction meetings and activities. The construction phase will be 2.5 years and includes construction support services, review of Requests for Information (RFI), Submittals and Requests for Substitutions, attend weekly construction meetings, attend site visits, prepare designs related to change orders or RFI's, and preparation of an Operations and Maintenance (O&M) plan for the facility. The closeout phase will be .5 years and will include review of closeout documents, preparation of as-built Computer-Aided Design (CAD) drawings and closeout reports. In the event there are design or construction delays and/or follow-up sub projects, consultant services will be needed for design and construction support work, pushing the duration past the 5 year mark.

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:

This project requires special expertise in water treatment plant design and the ozonation process, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and need to have taste and odor control systems installed prior to the shutdowns.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Experienced professional engineers in the structural, electrical, power, process, mechanical and civil disciplines during the design and construction phases of the new raw water ozonation system and SVWTP improvements are needed. Areas of specialized engineering experience, such as ozonation and high voltage systems, are required. In addition, process modifications downstream of the raw water ozonation process requires expertise in water treatment. Design support services during the construction phase are needed to review RFI's, RFS' and Submittals, address design changes and prepare operations and maintenance plans and CAD drawings.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
No.

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

The Team is identifying scope and in-house and DPW resources for the design and construction work on the project. The design and support services will assigned to City resources accordingly.

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

- A. Explain why civil service classes are not applicable.
This project requires special expertise in water treatment plant design, which is not available from City employees.
- 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's not practical. Engineers are needed to perform engineering design for projects, but this level of resources is not a long-term need that warrants hiring personnel. In addition, specialized engineering is also required which is not normally needed for projects and hiring individuals for these specialized areas is not feasible.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. The Ozone process is a specialized system. In-house engineering staff will gain valuable knowledge and experience on this project. In addition to the knowledge transfer that will be provided as a result of working closely with the award firm, the consultant will also provide brown bag lunch presentations (one-hour each) throughout the term of the project. The target audience will be Water Enterprise, EMB and PMB staff. Planned topics will include in depth presentations on treatment technologies, facility operation and start-up, BIM, and/or lessons learned. These topics will benefit both the team directly assigned to the project, as well as additional staff across multiple departments.
- 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 07/16/2018, 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: Shamica Jackson Phone: 415-554-0727 Email: SJackson@sflower.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47395 - 17/18

DHR Analysis/Recommendation:

action date: 09/17/2018

Commission Approval Required

Approved by Civil Service Commission with conditions

09/17/2018 DHR Approved for 09/17/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION

Dept. Code: REC

Type of Request: Initial Modification of an existing PSC (PSC # 41501 - 14/15)

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

Type of Service: Marina, Coastal and Civil Engineering Support Services

Funding Source: Rec & Park / Pac Gas & Electric

PSC Original Approved Amount: \$800,000 PSC Original Approved Duration: 01/01/15 - 12/31/17 (3 years)

PSC Mod#1 Amount: \$600,000 PSC Mod#1 Duration: 01/01/19-12/31/21 (4 years 1 day)

PSC Cumulative Amount Proposed: \$1,400,000 PSC Cumulative Duration Proposed: 7 years 1 day

1. Description of Work

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

The Recreation and Park Department (RPD) is seeking the services of engineering firms with marina and coastal engineering expertise that can deliver a Criteria Package for the waterside improvements to the Marina Yacht Harbor, East Harbor, which RPD intends will be performed under separate contract by a design-builder. This consultant shall be tasked with providing preliminary design services for marina, coastal and general civil engineering, and consulting support services during the design/build process. Landside improvement designs will be prepared by the City and County of San Francisco's Department of Public Works (DPW).

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

RPD has entered into a cost sharing agreement with Pacific Gas & Electric (PG&E) for the dredging, containment and capping of contaminated sediments in the San Francisco Marina's East Basin, and the associated re-building of the harbor after the remediation is complete. RPD and PG&E are working cooperatively to move the project forward as quickly as possible in order to remove contaminated sediments at the site. The goal of the project team is to commence construction in June 2016. Design and permitting for the dredging work scope is currently underway. If this PSC is denied, then remediation of contaminated sediment will be delayed beyond approved permit dates.

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 41501 - 14/15

D. Will the contract(s) be renewed?

Yes, if necessary to complete the required services.

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:

Area of proposed work is area where Pacific Gas & Electric remedial activities are to occur. Clean-

up of site under pending legal negotiation and coordination of marina rebuild with Pacific Gas & Electric clean up requires continued technical engineering support until settlement is finalized.

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:

Required experience includes, but is not limited to the following: experience designing recreational marina facilities, breakwaters, and/or piers in San Francisco Bay or elsewhere; experience in conducting storm wave analysis of high-energy seasonal events; experience in working with regulatory agencies; U.S. Army Corps of Engineers, San Francisco Regional Water Quality Control Board, and Bay Conservation and Development Commission; experience in negotiating with Federal, State, Regional, and Local agencies pertaining to additional studies for coastal environments; experience in surveying using Global Positioning Systems; and experience overseeing in-water construction contracts.

B. Reason for the request for modification:

An engineering firm is currently engaged in the East Harbor Renovation project, which is a joint site of a Pacific Gas & Electric remedial clean up action and recreational marina redevelopment. The Pacific Gas & Electric remedial clean up is in process of legal negotiation with the City and a Remedial Action Plan (RAP) has not been approved by the Regional Water Quality Control Board. As such, continued support and coordination is needed from the engineering firm by the Recreation and Park Department in order to be able to coordinate with Pacific Gas & Electric and its consultants for the execution of site clean-up

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Required experience includes, but is not limited to the following: experience designing recreational marina facilities, breakwaters, or piers in San Francisco Bay; experience in conducting storm wave analysis of high-energy seasonal events; experience in working with regulatory agencies; U.S. Army Corps of Engineers, San Francisco Regional Water Quality Control Board, and Bay Conservation and Development Commission; experience in surveying using Global Positioning Systems; and experience overseeing in-water construction.

B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

While the various Civil Engineering classifications work in support of RPD on many capital projects, the classes do not have the training and expertise in marine engineering, and have little or no experience in recreational marina design. Furthermore, specialized expertise is necessary related to the complex permitting and approval processes of the multiple regulatory agencies that oversee work on San Francisco Bay waterways.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It would not be practical to adopt a new class due to the specialized nature of marina design and the limited number of facilities of this type under the jurisdiction of the City and County of San Francisco.

6. Additional Information

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

No.

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

No training will be conducted.

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 01/11/19, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21;

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street, San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41501 - 14/15

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of sean.mcfadden@sfgov.org
Sent: Friday, January 11, 2019 11:22 AM
To: McFadden, Sean (REC); Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 41501 - 14/15 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The RECREATION AND PARK COMMISSION -- REC has submitted a modification request for a Personal Services Contract (PSC) for \$600,000 for services for the period January 1, 2019 – December 31, 2021. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/12325>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- RECDept. Code: RECType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Marina, Coastal and Civil Engineering Support ServicesFunding Source: Rec & Park / Pac Gas & ElectricPSC Amount: \$800,000PSC Est. Start Date: 01/01/2015PSC Est. End Date: 12/31/2017**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Recreation and Park Department (RPD) is seeking the services of engineering firms with marina and coastal engineering expertise that can deliver a Criteria Package for the waterside improvements to the Marina Yacht Harbor, East Harbor, which RPD intends will be performed under separate contract by a design-builder. This consultant shall be tasked with providing preliminary design services for marina, coastal and general civil engineering, and consulting support services during the design/build process. Landside improvement designs will be prepared by the City and County of San Francisco's Department of Public Works (DPW).

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

RPD has entered into a cost sharing agreement with Pacific Gas & Electric (PG&E) for the dredging, containment and capping of contaminated sediments in the San Francisco Marina's East Basin, and the associated re-building of the harbor after the remediation is complete. RPD and PG&E are working cooperatively to move the project forward as quickly as possible in order to remove contaminated sediments at the site. The goal of the project team is to commence construction in June 2016. Design and permitting for the dredging work scope is currently underway. If this PSC is denied, then remediation of contaminated sediment will be delayed beyond approved permit dates.

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.

RPD secured the services of a marine engineering firm in 2007. RPD secured the services of a marine, coastal and engineering team for the design of the first phase of the project (West Harbor) in 2008 (PSC #4055-08/09). The West Harbor project was completed in 2013.

D. Will the contract(s) be renewed?

Yes, if necessary to complete the required services.

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:

Required experience includes, but is not limited to the following: experience designing recreational marina facilities, breakwaters, and/or piers in San Francisco Bay or elsewhere; experience in conducting storm wave analysis of high-energy seasonal events; experience in working with regulatory agencies; U.S. Army Corps of Engineers, San Francisco Regional Water Quality Control Board, and Bay Conservation and Development Commission; experience in negotiating with Federal, State, Regional, and Local agencies pertaining to additional studies for coastal environments; experience in surveying using Global Positioning Systems; and experience overseeing in-water construction contracts.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Required experience includes, but is not limited to the following: experience designing recreational marina facilities, breakwaters, or piers in San Francisco Bay; experience in conducting storm wave analysis of high-energy seasonal events; experience in working with regulatory agencies; U.S. Army Corps of Engineers, San Francisco Regional Water Quality Control Board, and Bay Conservation and Development Commission; experience in surveying using Global Positioning Systems; and experience overseeing in-water construction.

B. Which, if any, civil service class(es) normally perform(s) this work? 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5241, Engineer; 5362, Engineering Assistant; 5364, Engineering Associate 1; 5366, Engineering Associate 2;

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

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

None, as the services required for this work necessitate specialized expertise in marine engineering, and recreational marina design in particular, not commonly associated with the aforementioned classes. In addition, sub-consultant electrical and mechanical design work make up a small percentage of the engineering services to be provided under this contract.

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

A. Explain why civil service classes are not applicable.

While the various Civil Engineering classifications work in support of RPD on many capital projects, the classes do not have the training and expertise in marine engineering, and have little or no experience in recreational marina design. Furthermore, specialized expertise is necessary related to the complex permitting and approval processes of the multiple regulatory agencies that oversee work on San Francisco Bay waterways.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new class due to the specialized nature of marina design and the limited number of facilities of this type under the jurisdiction of the City and County of San Francisco.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No.

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

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

No.

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

No.

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

No.

7. **Union Notification:** On 10/22/2014, 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: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41501 - 14/15

DHR Analysis/Recommendation:

action date: 01/05/2015

Commission Approval Required

Approved by Civil Service Commission

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION

Dept. Code: REC

Type of Request: Initial Modification of an existing PSC (PSC # 44918 - 13/14)

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

Type of Service: Landscape Architecture, Engineering, and Outreach Services

Funding Source: Transit Center Dev Impact Fees

PSC Original Approved Amount: \$2,000,000 PSC Original Approved Duration: 07/15/14 - 07/01/19 (4 years 50 weeks)

PSC Mod#1 Amount: \$6,017,719 PSC Mod#1 Duration: 02/10/19-02/10/24 (4 years 32 weeks)

PSC Cumulative Amount Proposed: \$8,017,719 PSC Cumulative Duration Proposed: 9 years 30 weeks

1. Description of Work

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

Provide full Landscape Architectural, Architectural, Engineering, and Outreach services for the Portsmouth Square Renovation. This includes all services necessary for all phases of project delivery: conceptual design, schematic design, design development, complete construction documents for permitting, bid, construction administration, and closeout. Scope will also include facilitation of broad community and stakeholder outreach process in multiple languages. A/E firm shall also provide cost estimating services during the course of the project.

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

This service is the initial phase of the Portsmouth Square Renovation project. It will be completed using of impact fees allocated to Chinatown parks from the Transit Center development project. The service requires historical evaluation, community outreach and facilitation as well as design services. Taken as a whole, these skills are more appropriate for an outside to service contract. Denial will significantly slow down the overall project and jeopardize community support due to delays.

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?

No.

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

The cumulative total time will extend the service from 5 years to 10 years. This will track with design and construction process.

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:

Recreation and Park Department (RPD) staff worked with community members to determine the most appropriate path for development of a concept design that would lead to a generally accepted pathway. This outreach resulted in a Request for Proposals for firms with specialized experience in design and construction of historically significant facilities as well as definite understanding of the Chinatown community.

B. Reason for the request for modification:

In 2015, the Civil Service Commission approved a contract amount of \$2,082,281 for the Portsmouth Square Architecture and Engineering (A&E) consultant team. This amount matched the full-services fee proposal the consultant team were asked to provide based on a set of assumptions for the project ahead. One of the assumptions on which their fee was based, was a construction budget of \$17.7M. The concept and planning phase of the project was subsequently awarded to the consultant team in 2016 for \$296,725, with the intention of awarding remaining phases at the conclusion of the concept and planning phase when we would have a concept design and cost estimate, and additional funds were available. As the consultants noted in their 2015 proposal, "the fees and structure of the team may need to be revised depending on the final scope at the end of the concept phase." Neither the Recreation and Park Department (RPD) nor the consultants could have predicted the nature of the community design process that followed, the resulting concept design, or the challenging construction cost climate we would be faced with three years later. Community Process Over the course of the concept and planning phase, RPD and the A&E consultant team led a 15-month-long community process that included five community workshops, dozens of key stakeholder interviews, and yielded hundreds of survey responses collected from the Portsmouth Square and Chinatown community. The level of community participation for this project has been unprecedented for RPD, with over 200 attendees at each workshop. Over the course of the community process, the scope of the project evolved significantly from what RPD and the consultant team anticipated at the outset. Driven by the community's expressed desires for this park and integrating the public's feedback collected over the five workshops, the consultant team offered a series of conceptual frameworks as a starting point then systematically refined them with multiple iterations, each time seeking the community's preferences on difficult choices and trade-offs such as whether or not to remove the existing pedestrian bridge. The community process concluded in July 2018 with the fifth and final workshop, where the consultants presented the resulting concept design. 2018 Concept Design A cost estimate was prepared based on the current concept design, confirming the construction cost to be in the order of magnitude of \$50M. That is three times what we expected back in 2015. Unfortunately, this dramatic increase in construction costs and rates of escalation are consistent with what we are seeing across all of our capital projects. As our department's analysis has demonstrated, a dollar in today's construction market does not buy what it did a year ago. Furthermore, the complexity of the project has changed from what was foreseen in 2015, where we had not anticipated scope such as seismic upgrades to the existing garage structure, removal of the pedestrian bridge, or a two-story clubhouse building to name a few. These factors directly impact the A&E consultant team's fee, which includes a 33.75% commitment to Local Business Enterprise (LBE) firms. As a result, their revised overall fee today has more than tripled from the contract amount approved in 2015, corresponding to the increased construction cost

and scope of the project. Value of This Team While the increase to the A&E consultant fee is significant, the fee is fair and proportionate to the value this team brings to this project. In addition to their noteworthy qualifications and design talent, the team in place stood out among the final candidates during the original consultant selection process for their strong ties to the Chinatown community here in San Francisco. The faces of this team throughout the community engagement process have a relationship with every key stakeholder in the Chinatown community. Throughout the community process the team guided the community through the possibilities to consider, the choices to be made, and the iterations of the design. The team conducted many of the stakeholder interviews personally, and at each opportunity they were the ones speaking to community members, listening to their concerns and sharing insights for how the future park design addressed those concerns. This community knows this team and they trust them. Conversely, Chinatown community members can be distrustful of city agencies – many of them are not convinced the city has their best interests in mind, and they are skeptical of the city following-through on initiatives in their neighborhood. In one instance we learned of a particularly strained relationship between this community and the MTA, that came to bear when discussing traffic patterns around Portsmouth Square. RPD has learned to lean on this consultant team throughout our community engagement, and has successfully built trust with this group by way of their fondness for the team and views them as simultaneously neutral and impartial, as well as having their best interests in mind. We request that the Civil Service Commission increase the original A&E consultant team contract amount of \$2,082,281 to \$8.1M (granting an additional amount of \$6,017,719), to reflect the changes to the project and construction market over the past three years.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Architectural & Engineering services include Civil, Landscape Architectural, Architectural, Structural, Mechanical, Electrical, Plumbing, Irrigation, Community Outreach Facilitation, Historic Resource Evaluation, specification writing & cost estimating throughout the permit and bidding, Construction Administration and Warranty Phases.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5214, Building Plans Engineer; 5268, Architect; 5274, Landscape Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
Project involves extensive revision of high-profile, culturally and historically significant park design and program, beyond in kind replacement. As park is located in Chinatown neighborhood, consultant team must conduct comprehensive community outreach process in English, Mandarin, and Cantonese, with broad, diverse stakeholder groups.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, as outlined in 4A, Recreation and Park Department is seeking a design firm to achieve this need.

6. Additional Information

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

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

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.
Current contractor required to complete additional scope of work.

7. Union Notification: On 01/10/19, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street, San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44918 - 13/14

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of sean.mcfadden@sfgov.org
Sent: Thursday, January 10, 2019 11:01 AM
To: McFadden, Sean (REC); Wanless, Annie (HRD); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 44918 - 13/14 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The RECREATION AND PARK COMMISSION -- REC has submitted a modification request for a Personal Services Contract (PSC) for \$6,017,719 for services for the period February 10, 2019 – February 10, 2024. For all Modification requests, there is a 7-Day notice 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/12428>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: Landscape Architecture, Engineering, and Outreach Services

Funding Source: Transit Center Dev Impact Fees

PSC Amount: \$2,000,000

PSC Est. Start Date: 07/15/2014

PSC Est. End Date: 07/01/2019

1. Description of Work

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

Provide full Landscape Architectural, Architectural, Engineering, and Outreach services for the Portsmouth Square Renovation. This includes all services necessary for all phases of project delivery: conceptual design, schematic design, design development, complete construction documents for permitting, bid, construction administration, and closeout. Scope will also include facilitation of broad community and stakeholder outreach process in multiple languages. A/E firm shall also provide cost estimating services during the course of the project.

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

This service is the initial phase of the Portsmouth Square Renovation project. It will be completed using of impact fees allocated to Chinatown parks from the Transit Center development project. The service requires historical evaluation, community outreach and facilitation as well as design services. Taken as a whole, these skills are more appropriate for an outside to service contract. Denial will significantly slow down the overall project and jeopardize community support due to delays.

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

These services have been provided in the past through the Bureau of Architecture and private consultants. An example is PSC#4046-13/14 for ELS/Kuth Raineri Joint venture for the Balboa Park Pool.

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:

Recreation and Park Department (RPD) staff worked with community members to determine the most appropriate path for development of a concept design that would lead to a generally accepted pathway. This outreach resulted in a Request for Proposals for firms with specialized experience in design and construction of historically significant facilities as well as definite understanding of the Chinatown community.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Architectural & Engineering services include Civil, Landscape Architectural, Architectural, Structural, Mechanical, Electrical, Plumbing, Irrigation, Community Outreach Facilitation, Historic Resource Evaluation, specification writing & cost estimating throughout the permit and bidding, Construction Administration and Warranty Phases.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5214, Building Plans Engineer; 5268, Architect; 5274, Landscape Architect;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Project involves extensive revision of high-profile, culturally and historically significant park design and program, beyond in kind replacement. As park is located in Chinatown neighborhood, consultant team must conduct comprehensive community outreach process in English, Mandarin, and Cantonese, with broad, diverse stakeholder groups.

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

- A. Explain why civil service classes are not applicable.
Project involves extensive revision of high-profile, culturally and historically significant park design and program, beyond in kind replacement. As park is located in Chinatown neighborhood, consultant team must conduct comprehensive community outreach process in English, Mandarin, and Cantonese, with broad, diverse stakeholder groups.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, as outlined in 4A, Recreation and Park Department is seeking a design firm to achieve this need.

6. Additional Information

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

7. **Union Notification:** On 03/11/2014, 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: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44918 - 13/14

DHR Analysis/Recommendation:

action date: 06/02/2014

Commission Approval Required

Approved by Civil Service Commission

06/02/2014 DHR Approved for 06/02/2014

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY

Dept. Code: TIS

Type of Request: Initial Modification of an existing PSC (PSC # 44536 - 18/19)

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

Type of Service: Telephony, Upgrade the Network, Network Moves, and Contact Center Migration Project Services

Funding Source: General Funds

PSC Original Approved Amount: \$9,500,000

PSC Original Approved Duration: 01/02/19 - 12/31/27 (9 years)

PSC Mod#1 Amount: \$20,500,000

PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$30,000,000

PSC Cumulative Duration Proposed: 9 years

1. Description of Work

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

The Department of Technology has projects underway in the areas of: upgrading Wide and Local Area Networks, migrating Telephony systems to the City's new Cisco Call Manager, and moving Departments to new office spaces. The Department of Technology will also begin a project to migrate approximately 15 separate Contact Centers to a unified Enterprise Contact Center system. The awarded Supplier will provide project services for the upgrade, move, and migration project areas utilizing following phased structure: 1) Discovery and Analysis, 2) Planning, 3) Upgrade/Migration, 4) Post Go-Live support and training for handoff to City staff. Supplemental services include reviewing current systems and environments, designing new networks and systems, developing migration plans, configuring, installing, and testing new systems, moving and installing networks in new locations, providing support and training City staff on how to maintain and operate new systems.

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

This service is necessary for timely completion of projects in critical areas of Wide and Local Area Network upgrades (Upgrade the Network), Voice Over Internet Protocol Migration, and Contact Center Migration. Denying this service will cause significant delays in migrating outdated network and telephony systems to newer, more stable platforms. Significant degradations in service will occur due to delays and may result in outages of critical network, contact center, and telephony systems. Departments will also be delayed in moving to new office space locations.

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 44536 - 18/19

D. Will the contract(s) be renewed?

Yes, there is a possibility that the contract will be extended or renewed because of the magnitude of the projects as a whole.

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

The project will require more than five years to complete because the City has only begun to migrate five departments out of sixty departments and agencies from the Private Branch Exchange (PBX) system to the Voice Over Internet Protocol (VOIP) system. The project is expected to take at least seven years to complete.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

This is a Citywide investment to convert the current public exchange telephony system to a Voice over Internet Protocol as well as consolidating the City's disparate Contact Centers and upgrading the City's Wide and Local Area Networks which requires expertise, knowledge and certifications that City employees do not have.

B. Reason for the request for modification:

The value of the request must encompass the expected volume for the conversion of the City's telephony system from the old PBX equipment to the Voice Over Internet Protocol. To achieve this, the City's infrastructure to include its Local Area Network (LAN) must be upgraded. As such, the Department of Technology intends to order upgrades and maintenance of IT Local Area Network (LAN) wired and wireless infrastructure. This includes, but is not limited to hardware, software, maintenance services, licenses, network components, lifecycle management, and warranty (e.g. Smartnet services).

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must be a Cisco Gold Level Partner and have at least two Master Certifications from the following list: Collaboration, Cloud Builder, Networking, or Security. Staff working on the projects must have knowledge and experience with Cisco Wide and Local Area Networks, Telephony, and Contact Center systems in subject areas such as scoping, architecture, design, development, configuration, installation, and support. Specific projects will require additional Certifications such as Cisco Certified Network Professional, Cisco Certified Design Professional, Cisco Certified Design Expert, and Cisco Certified Internetwork Expert

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; 1053, IS Business Analyst-Senior;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Although City has employees with some of the certifications, no City employee has Master Certifications nor the highly specialized skills to complete a Citywide level Wide and Local Area Networks, Telephony and Contact Center Migration Projects.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the classifications exist, but no City employee holds the Master Certifications that is needed for these high level projects.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Training will vary from project to project but will likely involve 20-40 hours of training for Department of Technology staff when new systems are integrated as part of the project. Systems will be handed over to existing City staff to operate and maintain. Overall training will be approximately 200 hours. Classes to be trained are: 1041 IS Engineer – Assistant - 4 1042 IS Engineer – Journey- 7 1043 IS Engineer – Senior- 7 1044 IS Engineer – Principal - 4 1053 IS Business Analyst – Senior- 5
- 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 01/18/19, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21;

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

Name: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44536 - 18/19

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 03/04/2019

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of jolie.gines@sfgov.org
To: [Gines, Jolie \(TIS\); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR \(HRD\)](mailto:Gines,Jolie(TIS);ecassidy@ifpte21.org;WendyWong26@yahoo.com;wendywong26@yahoo.com;tmathews@ifpte21.org;kschumacher@ifpte21.org;pkim@ifpte21.org;amakayan@ifpte21.org;L21PSCReview@ifpte21.org;DHR-PSCCoordinator,DHR(HRD))
Subject: Receipt of Modification Request to PSC # 44536 - 18/19 - MODIFICATIONS
Date: Friday, January 18, 2019 2:54:46 PM

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a modification request for a Personal Services Contract (PSC) for \$20,500,000 for services for the period March 1, 2019 – December 31, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/12478>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS

Dept. Code: TIS

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

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

Type of Service: Telephony, Upgrade the Network, Network Moves, and Contact Center Migration Project Services

Funding Source: General Funds

PSC Amount: \$9,500,000

PSC Est. Start Date: 01/02/2019

PSC Est. End Date 12/31/2027

1. Description of Work

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

The Department of Technology has projects underway in the areas of: upgrading Wide and Local Area Networks, migrating Telephony systems to the City's new Cisco Call Manager, and moving Departments to new office spaces. The Department of Technology will also begin a project to migrate approximately 15 separate Contact Centers to a unified Enterprise Contact Center system. The awarded Supplier will provide project services for the upgrade, move, and migration project areas utilizing following phased structure: 1) Discovery and Analysis, 2) Planning, 3) Upgrade/Migration, 4) Post Go-Live support and training for handoff to City staff. Supplemental services include reviewing current systems and environments, designing new networks and systems, developing migration plans, configuring, installing, and testing new systems, moving and installing networks in new locations, providing support and training City staff on how to maintain and operate new systems.

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

This service is necessary for timely completion of projects in critical areas of Wide and Local Area Network upgrades (Upgrade the Network), Voice Over Internet Protocol Migration, and Contact Center Migration. Denying this service will cause significant delays in migrating outdated network and telephony systems to newer, more stable platforms. Significant degradations in service will occur due to delays and may result in outages of critical network, contact center, and telephony systems. Departments will also be delayed in moving to new office space locations.

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

The service is being provided by a supplier for whom a solicitation was issued to the City's Technology Marketplace.

D. Will the contract(s) be renewed?

Yes, there is a possibility that the contract will be extended or renewed because of the magnitude of the projects as a whole.

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 initiative is a massive multi-year project which includes converting the Citywide Private Branch Exchange to the Voice Over Internet Protocol telephony system, consolidating disparate City Contact Centers to a unified Enterprise Contact Center System and upgrading the Citywide Local and Wide Area Network.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

This is a Citywide investment to convert the current public exchange telephony system to a Voice over Internet Protocol as well as consolidating the City's disparate Contact Centers and upgrading the City's Wide and Local Area Networks which requires expertise, knowledge and certifications that City employees do not have.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Contractor must be a Cisco Gold Level Partner and have at least two Master Certifications from the following list: Collaboration, Cloud Builder, Networking, or Security. Staff working on the projects must have knowledge and experience with Cisco Wide and Local Area Networks, Telephony, and Contact Center systems in subject areas such as scoping, architecture, design, development, configuration, installation, and support. Specific projects will require additional Certifications such as Cisco Certified Network Professional, Cisco Certified Design Professional, Cisco Certified Design Expert, and Cisco Certified Internetwork Expert
- 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; 1053, IS Business Analyst-Senior;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Although City has employees with some of the certifications, no City employee has Master Certifications nor the highly specialized skills to complete a Citywide level Wide and Local Area Networks, Telephony and Contact Center Migration Projects.

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

- A. Explain why civil service classes are not applicable.
Although City has employees with some of the certifications, no City employee has Master Certifications nor the highly specialized skills to complete a Citywide level Wide and Local Area Networks, Telephony and Contact Center Migration Projects.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the classifications exist, but no City employee holds the Master Certifications that is needed for these high level projects.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. Training will vary from project to project but will likely involve 20-40 hours of training for Department of Technology staff when new systems are integrated as part of the project. Systems will be handed over to existing City staff to operate and maintain. Overall training will be approximately 200 hours. Classes to be trained are: 1041 IS Engineer – Assistant - 4 1042 IS Engineer – Journey- 7 1043 IS Engineer – Senior- 7 1044 IS Engineer – Principal - 4 1053 IS Business Analyst – Senior- 5
- 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 08/28/2018, 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: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44536 - 18/19

DHR Analysis/Recommendation:

action date: 11/19/2018

Commission Approval Required

Approved by Civil Service Commission

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