



London Breed
Mayor

Micki Callahan
Human Resources Director

Date: September 28, 2018

To: The Honorable Civil Service Commission

Through: Micki Callahan *Micki Callahan*
Human Resources Director

From: John Tsutakawa, DSS
Deborah Landis, CPC
Elaine Walters, FIR
Jacquie Hale, DPH

Subject: **Personal Services Contracts Approval Request**

This report contains five (5) 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
\$16,148,000	\$179,262,524	\$653,840,996

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Human Services
1650 Mission St #300
San Francisco, CA 94103
(415) 557-6299

Deborah Landis
City Planning
1650 Mission Street, Suite #400
San Francisco, CA 94103
(415) 575-9118

Elaine Walters
Fire
698 Second Street, Rm 209
San Francisco, CA 94107
(415) 558-3418

Jacquie Hale
Public Health
101 Grove Street Rom 307
San Francisco, CA 94102
(415) 554-2609

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POSTING FOR**October 15, 2018****PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR****Commission Hearing Date**

2018-10-15

APPLY

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
40323 - 17/18	HUMAN SERVICES	\$898,000.00	<p>Contractor will partner with HSA staff to implement recommendations the Agency's resource family recruitment plan. The recruitment plan is part of a series of major service components. They are:</p> <ol style="list-style-type: none"> 1. Data Analysis and Research Services 2. Marketing/Advertising Development 3. Recruitment Plan Development and execution 4. Provision of advertising, such as MUNI/BART ads, social media, billboard and/or posters 	July 1, 2018	June 30, 2021	REGULAR
44102 - 18/19	CITY PLANNING	\$1,000,000.00	<p>Consultant will work with City staff and neighborhood groups, businesses, individuals, and other interested community organizations to implement, design, install, maintain, and potentially fiscally sponsor Groundplay projects as identified by the City and County of San Francisco. Each Groundplay project is intended to be publicly accessible and is temporary (and reversible when necessary) in nature to test new ideas in the public spaces. Scope of work includes but is not limited to: procurement of materials, installation of fixtures, maintenance of plantings and project features, coordination with the public, etc. All work will be approved and overseen by City and County of San Francisco staff prior to and throughout the life of each Groundplay project.</p>	October 31, 2018	October 31, 2022	REGULAR
45510 - 18/19	CITY PLANNING	\$750,000.00	<p>The Planning Department is seeking to utilize the Controller's Office and Office of Economic and Workforce Development pre-qualified pool for economic consultant services. Selected consultant(s) will provide as-needed professional services which will include, but are not limited to fiscal and economic impact analysis, financial feasibility assessment, impact fee nexus analysis, real estate analysis, labor market analysis, economic development strategy, and economic research. Potential projects could include Citywide development impact fee and transit sustainability fee nexus study/ies, infrastructure level-of-service analysis, financial feasibility studies for new development, triple bottom line analysis and modelling, cost-benefit analysis, and other similar studies.</p>	November 1, 2018	October 31, 2022	REGULAR

TOTAL AMOUNT \$2,648,000

Posting For October 15, 2018

Proposed Modifications to Personal Services Contracts

Commission Hearing Date

2018-10-15

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
43352 - 13/14 - MODIFICATIONS 2018	October 15,	FIRE DEPARTMENT -- FIR	\$1,500,000	\$3,000,000	<p>Provide complete billing and collection services for all Fire Department paramedic ambulance activities. Receive secured data of Department's Electronic Patient Care Reports and transmittal into billing system; data input, scanning and entry of paper pre-hospital care records; coding and medical necessity leveling of incidents; patient contact for follow-up collections; bill and invoice creation, generation, and distribution; industry research on fee structures and "usual and customary" rates; maintain fluency in payer class allowances, as well as changes and updates in the federal reimbursement structures and fee schedules; analyze revenue and provide assessments and projections to financial staff.</p> <p>Provide and assist with maintaining electronic field data capture system for use by field personnel; collection of Continuous Quality Improvement information. The duration of the contract is for four years only, through 2018. However, the Department may seek to exercise one or both two-year extension options in the future by obtaining modification approval from DHR and/or Civil Service Commission.</p>	07/01/2018	06/30/2022	REGULAR
48070 - 13/14 - MODIFICATIONS 2018	October 15,	PUBLIC HEALTH -- DPH	\$12,000,000	\$18,504,869	<p>Contractor will utilize its legal staff to provide representation directly to clients to maximize client income in order to stabilize client living situations and provide client access to healthcare. The Department of Public Health (DPH) provides these advocacy services in administrative hearings and related legal processes in collaboration with the Human Services Agency (HSA) and other service providers, as these agencies are often serving the same clients, and among these partners, DPH Behavioral Health Services (BHS) contributes its clear experience and expertise in serving clients with behavioral health and HIV/AIDS diagnoses. Clients will be received primarily from referrals from HSA, DPH (civil service) mental health centers and/or providers serving People Living with HIV/AIDS (PLWHA) in San Francisco, and who are uninsured, underinsured, or at risk of losing insurance, in order to obtain or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding</p>	07/01/2018	06/30/2022	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					Medi-Cal/Medicare coverage. Clients likely will include people who have multiple diagnoses, have been incarcerated, have documented substance use disorders, who are homeless, single parents, people of color, immigrants, women, and/or part of the Lesbian/Gay/Bisexual/Transgender (LGBT) community, and may be monolingual or limited English-speaking, with fluency in a range of languages, including Spanish, Cantonese, Mandarin and Tagalog.			

TOTAL AMOUNT \$13,500,000

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Strategic planning for Resource Family Recruitment

Funding Source: State and Federal

PSC Amount: \$898,000

PSC Est. Start Date: 07/01/2018

PSC Est. End Date 06/30/2021

1. Description of Work

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

Contractor will partner with HSA staff to implement recommendations the Agency's resource family recruitment plan. The recruitment plan is part of a series of major service components. They are:

1. Data Analysis and Research Services
2. Marketing/Advertising Development
3. Recruitment Plan Development and execution
4. Provision of advertising, such as MUNI/BART ads, social media, billboard and/or posters

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

Resource families provide youth with an opportunity to grow and develop in a family environment. Finding families ready to look after these children is one of the most important responsibilities of the child welfare system. Family and Children's Services (FCS) must retain and recruit a pool of well-trained and well-supported resource families, who are willing to take care of children with very diverse profiles and necessities. FCS is at a critical point in their need for resource families, in response to State Legislation on Continuum of Care reform (CCR), outlined in Assembly Bill 403. A key concept of CCR is based on research that indicates family care is essential for foster children in order to develop successfully and improve outcomes. Consequently, CCR seeks to increase family home settings for children in foster care and limit the use of congregate care (group homes) As of January 2016, San Francisco County had 869 children in out of home care. Of these children, 77 were placed in facility based licensed care (group homes) and 348 were placed in family based licensed care (foster homes) and Relative/NREFM homes, with the remainder split among other placements such as Foster Family Agencies (FFA) and Guardian homes. As such, FCS has a need for a consultant to partner with FCS staff and/or management to immediately develop and implement a new resource family recruitment plan, as well as provide other related services. These efforts will be part of a multi-year, multi-pronged approach geared toward increasing the number of children that will achieve permanency in San Francisco County. The result of denying the contract will be continued insufficiency of placements for foster children.

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

No strategic plan previously developed or implemented in past decade.

D. Will the contract(s) be renewed?

No

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

2. Reason(s) for the Request

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

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

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

- B. Explain the qualifying circumstances:

HSA is experiencing a lack of available resource families for children in care; leading to children being placed out of county, far away from kin. With the State-wide initiative of Continuum of Care reform (Assembly Bill 403), all counties must build increased capacity of resource family home and limit the use of congregate care. HSA does not have the infrastructure or capacity to implement multi-media resource family recruitment plan

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Data analysis and research skills Designing comprehensive resource family recruitment and retention plan Marketing/advertising skills Graphic template skills High level communication materials in wide variety of forms Ability to purchase media services in the public sector

- B. Which, if any, civil service class(es) normally perform(s) this work? 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 5322, Graphic Artist; 9252, Communications Specialist;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
The actual media (television, radio, and print) in which ads will be placed.

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.

Scope of work is time sensitive requiring quick expertise and planning. The Department lacks the capacity necessary to deliver a timely, coordinated media plan. Majority of funding is the purchasing and placing of actual advertisements, such as billboards, posters, social media, bus/MUNI/BART ads-City does not have capacity,

- 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, need for foster parent recruitment campaign in not continuing work. Majority of costs in service are for media buys; not in civil service scope.

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

7. **Union Notification:** On 08/07/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Municipal Executive Association; SEIU 1021 Miscellaneous

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

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

Address: 1650 Mission Street, Suite 300 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40323 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/15/2018

Receipt of Union Notification(s)

From: DHR-PSCCoordinator, DHR (HRD)
To: Gendelman, Johanna (HSA)
Subject: FW: Receipt of Notice for new PCS over \$100K PSC # 40323 - 17/18
Date: Friday, September 07, 2018 9:21:55 AM

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

From: dhr-psccoordinator@sfgov.org [mailto:dhr-psccoordinator@sfgov.org] On Behalf Of john.tsutakawa@sfgov.org
Sent: Tuesday, August 07, 2018 4:16 PM
To: Tsutakawa, John (HSA); Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA); david.canham@seiu1021.org; jtanner940@aol.com; camaguey@sfmea.com (contact); 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; Gendelman, Johanna (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40323 - 17/18

RECEIPT for Union Notification for PSC 40323 - 17/18 more than \$100k

The HUMAN SERVICES -- DSS has submitted a request for a Personal Services Contract (PSC) 40323 - 17/18 for \$898,000 for Initial Request services for the period 07/01/2018 – 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/11071> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

From: David Mulvey
To: [Gendelman, Johanna \(HSA\)](#); [Cohen, Allan \(HSA\)](#); [Cohen, Allan \(HSA\)](#); [Tsutakawa, John \(HSA\)](#)
Cc: [Valdeolivar, David \(HSA\)](#); [Meyers, Julie \(HSA\)](#); [Mouton, Tamisha \(HSA\)](#)
Subject: RE: PSC 40323
Date: Wednesday, August 29, 2018 11:14:13 AM

 Following our meeting today I am pleased to confirm that SEIU Local 1021 has no objection to PSC 40323 and waives the 60 day timeline requirements.

From: Gendelman, Johanna (HSA) [mailto:johanna.gendelman@sfgov.org]
Sent: Friday, August 10, 2018 4:18 PM
To: David Mulvey; Cohen, Allan (HSA); David Mulvey; Cohen, Allan (HSA); Tsutakawa, John (HSA)
Subject: PSC 40323

Hi David and Allan-

I believe you have been in touch with John Tsutakawa, Director of Contracts about the above PSC, which is for the development and execution of a comprehensive foster parent recruitment plan for both FCS and JPD with the firm Resource Development Associates (RDA). Attached are the scopes of work for both projects. Both projects total just about 1M.

We are a bit under time pressure and hope to cut the time needed for union review for the PSC.

Please take a look and let's get together and talk about any concerns SEIU might have.

Thanks so much –
Johanna Gendelman
Contracts Manager

(FYI...I'm out of the office next Tuesday-Friday)

CCSF-HSA - All outbound HSA email is automatically scanned for PII and PHI by Zix Email Encryption

From: XiuMin Li
To: Gendelman, Johanna (HSA); David Canham
Cc: Choi, Suzanne (HRD); Tsutakawa, John (HSA)
Subject: RE: PSC 40323-TIME SENSITIVE. please respond
Date: Wednesday, September 12, 2018 1:29:50 PM

Yes, we concur with David that we are okay with this PSC.



Cheers,

XiuMin Li
Field Supervisor
SEIU 1021

Member Resource Center (MRC): 1-877-687-1021
Direct: 415-848-3686
SF Office Fax: 415-431-6241

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

From: Gendelman, Johanna (HSA) [mailto:johanna.gendelman@sfgov.org]
Sent: Wednesday, September 12, 2018 10:14 AM
To: David Canham; XiuMin Li
Cc: Choi, Suzanne (HRD); Tsutakawa, John (HSA)
Subject: RE: PSC 40323-TIME SENSITIVE. please respond
Importance: High

Hi
David And Xiumin-
Please see below.
Can you formally concur with David Mulney's recommendation?
Please call me if you can if you have questions or concerns.
Johanna Gendelman
Contracts Manager
415-557-5507

From: Gendelman, Johanna (HSA)
Sent: Friday, September 07, 2018 10:05 AM
To: 'david.canham@seiu1021.org' <david.canham@seiu1021.org>; 'xiumin.li@seiu1021.org' <xiumin.li@seiu1021.org>
Cc: Choi, Suzanne (HRD) <suzanne.choi@sfgov.org>

Subject: FW: PSC 40323

Importance: High

Do you concur with this?

Thanks

Johanna Gendelman

Contracts Manager, HAS

415-557-5507

From: David Mulvey <David.Mulvey@seiu1021.org>

Sent: Wednesday, August 29, 2018 11:14 AM

To: Gendelman, Johanna (HSA) <johanna.gendelman@sfgov.org>; Cohen, Allan (HSA) <Allan.Cohen@sfgov.org>; Cohen, Allan (HSA) <Allan.Cohen@sfgov.org>; Tsutakawa, John (HSA) <John.Tsutakawa@sfgov.org>

Cc: Valdeolivar, David (HSA) <David.Valdeolivar@sfgov.org>; Meyers, Julie (HSA) <Julie.Meyers@sfgov.org>; Mouton, Tamisha (HSA) <Tamisha.Mouton@sfgov.org>

Subject: RE: PSC 40323



Following our meeting today I am pleased to confirm that SEIU Local 1021 has no objection to PSC 40323 and waives the 60 day timeline requirements.

From: Gendelman, Johanna (HSA) [mailto:johanna.gendelman@sfgov.org]

Sent: Friday, August 10, 2018 4:18 PM

To: David Mulvey; Cohen, Allan (HSA); David Mulvey; Cohen, Allan (HSA); Tsutakawa, John (HSA)

Subject: PSC 40323

Hi David and Allan-

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We are a bit under time pressure and hope to cut the time needed for union review for the PSC.

Please take a look and let's get together and talk about any concerns SEIU might have.

Thanks so much –

Johanna Gendelman

Contracts Manager

(FYI...I'm out of the office next Tuesday-Friday)

CCSF-HSA - All outbound HSA email is automatically scanned for PII and PHI by Zix Email Encryption

Additional Attachment(s)

Appendix A: Services to be Provided
Resource Development Associates
Strategic Planning for Resource Family Recruitment
June 1, 2017 – June 30, 2018

I. Purpose of Contract

Resource families provide youth with an opportunity to grow and develop in a family environment. Finding families ready to look after these children is one of the most important responsibilities of the child welfare system. FCS must retain and recruit a pool of well-trained and well-supported resource families, who are willing to take care of children with very diverse profiles and necessities.

Contractor will partner with HSA staff to immediately build on and provide recommendations to the Agency's current recruitment plan. In addition to development of a new recruitment strategy plan, Contractor will provide other related services. The recruitment plan is part of a series of major service components. They are:

1. Data Analysis and Research Services
2. Marketing/Advertising Development
3. Recruitment Plan Development
4. Coaching Services

Desired Recruitment Goals

- Increase Resource Homes/Placement Options within the City and County of San Francisco for all eligible youth in out of home placement, from birth to 21 years old:
- Retain existing foster parents for placement
- Expand the role of existing foster parents as resource families.
- Provide coaching to agency staff and current resource families.
- Improve FCS responsiveness for potential resource families

As of January 2016, San Francisco County had 869 children in out of home care. Of these children, 77 were placed in facility based licensed care (group homes) and 348 were placed in family based licensed care (foster homes) and Relative/NREFM homes, with the remainder split among other placements such as Foster Family Agencies (FFA) and Guardian homes. This grant will be part of a multi-year, multi-prong effort to increase the number of these children that will achieve permanency in San Francisco County.

II. Definitions

CARBON: Contracts Administration Reporting & Billing Online database

HSA: Human Services Agency

FCS: Family and Children Services

Resource Families: A “resource family” is an individual or couple that a county determines to have successfully met both the home approval standards and the permanency assessment criteria necessary for providing care for a related or unrelated child who is under the jurisdiction of the juvenile court, or otherwise in the care of a county child welfare agency or probation department.

III. Target Population

Prospective and current resource families; San Francisco children and youth in need of adoptive homes and permanent families.

IV. Description of Services

Contractor shall provide the following services during the term of this contract:

A. Data Analysis and Research Services

Gathering of Information regarding the current functioning of the program

A complete review of the foster care program is being carried out and the current recruitment plan will help determine the main objectives of the foster care recruitment plan. Knowing the data of the children that are currently in care and steps that have been taking thus far by the agency in regards to recruitment, will allow Contractor to identify gaps and priority areas for the recruitment of resource families. Contractor may obtain the information through direct consultation with current foster parents and agency employees. It is important that the Contractor review past recruitment campaigns, including the material used and statistics available.

In accordance with the above described services, Contractor will produce the following deliverables:

- Regular scheduled monthly phone calls with FCS staff to report on progress.
- Data analysis reports and recommendations to FCS to drive continuous quality improvement of the agency current recruitment plan.
- Presentations to FCS staff on findings and recommendations.

B. Marketing/Advertising Development

Contractor will produce the following deliverables:

- Develop population-appropriate strategies which may include, but are not limited to specific demographics and community groups, faith based organizations, schools, business, etc.

- Create a media strategy, including a program of press releases, public service announcements, etc.
- Develop a complete advertising campaign, which will include creative development and electronic format delivery of all materials needed to provide a comprehensive campaign.
- Distribution of creative recruitment materials and formats, such as brochures, posters, web site developments and updates, and internet site and social media advertisement, will be determined separately upon completion of the media strategy and advertising campaign.

C. Recruitment Plan Development

Contractor shall design a recruitment and retention plan for resource families based on local data and best practice. Specifically, Contractor will:

- Gather local data regarding recruitment, retention, and the foster care population.
- Analyze data to determine the current need in the county.
- Identify and collaborate with local partners and private agencies, current resource families, and faith communities.
- Design a recruitment plan tailored to the county and provide coaching to support implementation as determined in Section D.
- Design a retention plan to support adoptive and resource families and provide coaching to support implementation as determined in Section D.

D. Coaching Services

After the recruitment plan has been created, the Agency may opt to request coaching services from the vendor to assist in implementation of the plan. The extent of coaching will be determined once the full recruitment plan has been developed and may range from staff trainings to phone consultations with individual staff and/or group units. The schedule for completion of deliverables will be modified should coaching services be requested.

V. Location and Time of Services

The bulk of Contractor's work shall be done at their own location. When necessary, Contractor will work directly with staff and resource parents, such as attending face-to-face meetings, at locations to be determined.

VI. Project Deliverables

Provide a monthly progress report on deliverables. The following is a tentative schedule for completion of planned deliverables.

Deliverable	Completion
Project Launch	June 2017
Past Recruitment Campaigns Review	June 2017 – July 2017
Interviews with Key Staff & Project Stakeholders (5)	July 2017
Collect Local Recruitment, Retention, and Foster Care Population Data	July 2017
Deliverable	Completion
Focus Groups with Community Organizations and Other Stakeholders (10)	August 2017
Work Plan Finalization	August 2017
Best Practices Review	June 2017 - July 2017
Data Analysis & Family Recruitment Needs SWOT and Strategies	August 2017 - September 2017
Data Analysis & Population-Specific Recommendations Report	August 2017 - September 2017
Annual Report	August 2017
Create Media Strategy	September 2017 – October 2017
Develop Advertising Campaign & Supporting Creative Resources	September 2017 – October 2017
Quarterly Reports	October 2017, February 2018 & June 2018
Focus Groups to Vet Strategies with Local Partners & Stakeholders (4)	October 2017 - November 2017
Design Tailored Recruitment Plan	November 2017 – December 2017
Design Adoptive & Resource Families Retention Plan	November 2017 – December 2017
Monthly Progress Reports & Planning Calls with FCS Staff	Monthly and/or as needed, June 2017 – June 2018
Project Management, CARBON Data Entry, & Communication	Monthly and/or as needed, June 2017 – June 2018

VII. Reporting Requirements

- A. Contractor will provide a **monthly** report of activities, referencing the tasks as described in Section- Outcomes/Deliverables. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. Contractor will provide a **quarterly** report of activities, referencing the tasks as described in Section- Outcomes/Deliverables. Grantee will enter the

quarterly metrics in the CARBON database by the 15th of the month following the end of the quarter.

- C. Contractor will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section- Outcomes/Deliverables. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- D. Contractor will provide Ad Hoc reports as requested by the Department.
 - This may include progress reports for stakeholders and agency staff.

- E. For assistance with reporting requirements or submission of reports, contact:

David.Flores@sfgov.org
Principal Administrative Analyst, Office of Contract Management

or

Dominic.Uyeda@sfgov.org
Program Support Analyst, Division of Family and Children Services



City and County of San Francisco

**Request for Qualifications #726
Master Consulting Services for the Human Services Agency**

Services include:

Dignity Fund Coordination Services

Grant Writing Services

Meeting/Retreat Facilitation Services

Native American Genealogy Assessments

Ombudsman for Family & Children's Services

**Program Coordination Services for
Family & Children's Services**

Strategic Planning for Resource Family Recruitment

Date issued:

December 12, 2016

Statements of Qualifications due:

3:00 p.m., January 13, 2017

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Attachment I – Dignity Fund Charter Amendment

Attachment II – Dignity Fund FAQ

I. Introduction and Schedule

A. Introduction

The City and County of San Francisco Human Services Agency (HSA) was formed in 2004 with the merger of two previously existing city departments, the Department of Human Services (DHS) and the Department of Aging and Adult Services (DAAS). The Agency is the central resource for public assistance in the city. Its mission is to promote well-being and self-sufficiency among individuals, families and communities in San Francisco.

HSA is seeking to establish a pool of agencies and/or individual consultants qualified to provide ongoing or on-call consulting services in the following areas:

Dignity Fund Coordination Services

Grant Writing Services

Meeting/Retreat Facilitation Services

Native American Genealogy Assessments

Ombudsman for Family & Children's Services

*Program Coordination Services for
Family & Children's Services*

Strategic Planning for Resource Family Recruitment

Statements of Qualifications in response to this RFQ should indicate for which service area(s) the respondent would like to be considered and describe their qualifications, methodology and/or technical/programmatic approach to providing these services, organizational capacity, and program/project experience.

The qualified pool of providers resulting from this RFQ will remain so for the period of January 1, 2017 to December 31, 2018. Please note: Consultants selected from the qualified pool may be awarded contracts for term lengths that do not coincide with the aforementioned pre-qualification period. No guarantee of award of contract as a result of this process or placement in the qualified pool of vendors is stated or implied.

B. Schedule

The anticipated schedule for selection is as follows:

<u>Schedule</u>	<u>Date</u>
RFQ is issued by the City	December 12, 2016
Deadline for submission of written questions or requests for clarification	3:00 p.m., December 26, 2016
Submissions due	3:00 p.m., January 13, 2017

Dates and times subject to change

II. Scope of Services

The Scopes of Services provided herein are to be used as a general guide and are not intended to be a specific and detailed description of the ongoing or on-call consulting services solicited under this RFQ.

Dignity Fund Coordination Services

Background

HSA's Department of Aging and Adult Services (DAAS) plans and administers a variety of federal, state and local programs to assist older and functionally impaired adults and their families to maximize self-sufficiency, safety, health, and independence so that they can remain living in the community for as long as possible and maintain the highest quality of life.

On 11/8/16, voters approved an amendment to the Charter of the City and County of San Francisco to: 1) establish the Dignity Fund to support seniors and adults with disabilities; 2) require an annual contribution by the City to the Fund including a baseline of \$38 million, increasing by \$6 million for FY17/18, and increasing \$3 million each year for the next 9 years until FY26/27, and continuing at that amount, adjusted annually for changes in aggregate discretionary City revenues, for the next 10 years until FY36/37; 3) establish a planning process for expenditures from the Fund; 4) create an oversight and advisory committee; set an expiration date of 6/30/27; and, 6) change the "Commission on Aging" to the "Aging & Adult Services Commission" and update its responsibilities.

For the complete Charter amendment, please refer to Attachment I to this RFQ. A Dignity Fund FAQ is also included (Attachment II)

Description of Services

Consultant services will be required to complete a community needs assessment (CNA) as required by the Dignity Fund legislation. It will be completed to identify services to receive monies from the Fund. Core duties associated with the CNA will include, but not necessarily be limited to:

1. In conjunction with and at the direction of DAAS staff and/or management and the Fund oversight and advisory committee, development of a plan for how to conduct the assessment
2. Outreach for the CNA process that shall create opportunities for a robust cross section of stakeholders, including seniors, adults with disabilities, their caregivers, non-profit agencies, and other members of the public, to provide input
3. Qualitative and quantitative data sets collected through interviews, focus groups, surveys, or other outreach mechanisms to determine service gaps and unmet needs for services in support of seniors and adults with disabilities
4. A gap analysis comparing actual performance with potential or desired performance.
5. Development of a set of equity metrics to be used to establish a baseline of existing services and resources for seniors and adults with disabilities in low-income neighborhoods and disadvantaged communities, compared to services and resources available in the City as a whole. This equity analysis includes an examination of eligibility for existing programs and will seek to increase services and supports for low and modest income residents who are not currently eligible for home and community-based services.

Grant Writing Services

Background

HSA Departments and/or Divisions regularly pursue federal, state and private funding opportunities to leverage funding to support existing programs and services as well as pursue new initiatives that are consistent with the Agency's mission to promote well-being and self-sufficiency among individuals, families and communities in San Francisco.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

- A. Review requests for proposals or notices of funding availability, analyze HSA's strategic chances of being successful, and advise the agency on whether to proceed.
- B. Meet with HSA staff to strategize response.
- C. Estimate costs for developing particular proposals – and stay within costs (or immediately inform Agency of any unforeseen complication is leading to cost overrun).
- D. Review background materials; gather written information (reports, data analysis, strategic plans, etc.); conduct interviews with appropriate sources (HSA staff, other government entities, non-profit providers, advocacy and policy organizations, etc.).
- E. Prepare draft proposal and deliver to HSA for review (including proposal narrative, budgets, any necessary forms, etc.) before submission.
- F. Adjust the proposal according to edits specified by HSA;
- G. Revise proposal, prepare final draft and deliver to HSA for proofreading.
- H. When agreed that HSA will not be assembling the proposal for submission, assemble and submit proposal to funding source before the deadline.

Meeting/Retreat Facilitation Services

Background

HSA Departments and/or Divisions have a recurring need for meeting/retreat facilitation services for various staff and management work groups. The focus of the majority of these meetings is centered around team building, strategic planning, and/or development of periodic agency/unit/program goals and mission statements.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

1. Work collaboratively with Agency staff and/or management in developing the content and agenda for the facilitated meeting/retreat in advance of the meeting, allowing sufficient time for requisite review and final approval.
2. Facilitate on or off-site meetings/retreats for large or small groups of staff or managers on specific topic areas within a particular program or work group, backgrounds, or skill sets.
3. Utilize demonstrated and proven techniques to encourage participation and inclusion of all meeting/retreat participants as well as establish a safe environment that encourages free exchange of diverse ideas, inquiries, and viewpoints within agreed upon group norms.
4. Create and utilize a mechanism or process to accurately summarize meeting/retreat discussion with particular emphasis on agreed upon points and items requiring follow-up action and submit this to Agency staff and/or management within an agreed upon time after the event.
5. Develop and administer a post-event evaluation to be completed by meeting/retreat participants and submit the evaluations and a narrative summary of participant feedback to Agency staff and/or management within an agreed upon time after the event.

Native American Genealogy Assessments

Background

HSA's Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families.

FCS has identified a need to promote permanency through the identification of familial lineage for children and youth with Native American ancestry involved in the FCS child welfare system through the use of genealogical research, family finding and engagement as well as enhance tribal connections and facilitate completion of the tribal / Indian Child Welfare Act (ICWA) enrollment process for native children and youth.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

1. Provide family finding and engagement (FFE) services including discovery, exploration of files and records, documenting contacts, documenting the quality of relationships, connectedness mapping and engagement via phone, in-person interviews and family team meetings.
2. Conduct genealogical research to identify lineage from someone named on the tribe's base roll or relationship to a tribal member who descended from someone named in the base roll.*

** Base role is defined as the original list of members as designated in a tribal constitution or other document specifying enrollment criteria. Other conditions such as tribal blood quantum, tribal residency, or continued contact with the tribe are common.*

3. Research and document tribal affiliation by accessing the Tribal Leaders Directory published by the Bureau of Indian Affairs which identifies 562 federally recognized American Indian Tribes and Alaska Natives.
4. Complete the tribal enrollment/membership process as set forth in tribal constitutions, articles of incorporation or ordinances. This includes: contacting the tribe of affiliation, obtaining criteria for membership, completing necessary steps as required for enrollment.
5. Maintain regular and consistent communication with assigned Protective Services Workers to coordinate efforts and document progress.
6. Track the number of completed enrollments for each youth/child referred and provide periodic reports on this activity as well as discuss issues encountered with unsuccessful enrollments at intervals required by FCS staff and/or management.

Ombudsman for Family & Children's Services

Background

HSA's Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families.

FCS has an ongoing need for a consultant to serve as an ombudsman to respond to complaints from clients, foster/adoptive parents and biological parents regarding the FCS Division as well as properly and thoroughly investigate and facilitate resolution of said complaints.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

- A. Serving as an ombudsman to resolve issues and complaints regarding the FCS Division, responding to three levels of concerns:
 - a. Requests for information including identification of resources, and clarification of policies.
 - b. Issues requiring facilitation by the Ombudsman.
 - c. Assisting parties in submitting formal written complaints directed to FCS management regarding issues that cannot be resolved through direct meetings with the Child Welfare Worker.
- B. Meet with providers and clients at FCS offices, private homes, and community locations as necessary to provide information, make referrals, and conduct complaint intakes.
- C. Consult with FCS management and staff to resolve issues of concern and complaints.
- D. Assist the complainant and document resolution and recommendations. Resolution can include, but is not limited to, the following:
 1. Clarification of rules or policies for the client and/or staff and recommendations to the complainant regarding rules and policies.
 2. Mediating between the client and staff as appropriate.
 3. Forging agreements regarding actions by staff, client, or other party.
- E. Meet with the FCS Deputy Director or her/his designee at least quarterly to provide feedback regarding client service issues and to make policy recommendations.
- F. Compile program data for periodic reports summarizing the volume, source, nature, and outcome of complaints handled and reporting hours of service provided. This process includes submission of a management report at required intervals detailing policy concerns and recommendations that arise from the complaints received.
- G. Develop and maintain individual case files for every complaint call logged. A brief letter outlining the complaint, findings, and recommendations will be sent to the complainant and departmental staff, including the line supervisor, as appropriate.

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- H. Conduct community outreach to promote the development and maintenance of collaborative relations with DHS clients, foster parents, foster parent organizations, family organizations and community organizations. The consultant will make presentations about the ombudsman services to community based organizations and parenting classes, including Family Resource Centers, and other community-based organizations suggested by FCS, as well as conduct outreach regarding ombudsman services to the diverse communities of San Francisco, employing translators when necessary.
- I. Post notices at Dependency Court and in the visiting room describing ombudsman services and contact information.
- J. Participate in the Department's Parent Advisory Committee (PAC), and other committees relevant to client concerns. The consultant will attend monthly PAC meetings, and act in an advisory capacity by providing clarification of Departmental policy and procedures. Additionally, the consultant will provide the PAC with training and support for parent participation and leadership development, including topics such as communication, parent empowerment, and conflict resolution.

In this capacity, the consultant will maintain contact with the parents between meetings to ensure participation, follow-up on issues as appropriate, and provide assistance with special projects that the PAC members want to develop. The consultant will maintain regular contact and communication with FCS to support the work of the PAC.

- M. The consultant will administer a short survey for use by FCS clients, foster parents and DHS staff to complete when a complaint is closed, rating the consultant's performance. The survey will elicit feedback from the client on the process. Completed surveys must be kept on file for review by FCS staff.

Program Coordination Services for Family & Children's Services

Background

HSA's Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families.

State and federal mandates have increased and several large reform efforts are underway simultaneously. These include, but are not limited to:

- Implementation of practice changes and partnerships to meet the mandates of the Katie A v. Bonta settlement agreement;
- Implementation of Continuum of Care Reform (CCR) mandated by AB 403;
- Implementation of the California Core Practice Model for child welfare, recently developed by the counties;
- Development and evaluation of investments under the Title IV-E Waiver, including Safety Organized Practice (SOP), Wraparound, Visitation and others identified during the course of the Waiver.

The sweeping nature of these reforms and practice changes, and the need for coordination among county agencies (HSA, Department of Public Health (DPH), Juvenile Probation Department (JPD)) and numerous community-based organizations (CBOs), demands a high level of local coordination and support to ensure effective service delivery, training, and utilization management (data and fiscal coordination, etc.). Additionally, there are significant cultural changes for both public and private agencies to support the transformation that this requires.

FCS has an ongoing need for consultant services to provide coordination and support between FCS, placement providers, CBO service providers, Community Behavioral Health Services (CBHS) and other stakeholders to meet the mandates of these reforms.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

- At the direction of the FCS staff and/or management, provide coordination and support between FCS, placement providers, CBO service providers, CBHS and other stakeholders to meet the mandates of major reforms and systems changes.
- Development and support of implementation structures, including leadership teams, implementation teams/workgroups, in collaboration with FCS management and other partners. This includes meeting preparation, agenda development, documentation and tracking of action steps, and coordination with appropriate parties as required.
- Devising and supporting structures and communication materials that support integration of various initiatives into the CPM.
- Development and utilization of project plans, meeting charters, templates and communications materials.
- Meeting or corresponding regularly with the designated managers from each of the county departments and fiscal staff of the various agencies to ensure good communication among all participants and to sort out and document the details of the utilization system as required.
- Development and coordination of reports, materials, and documentation, as necessary. This includes development of outcome and data reports in partnership with HSA fiscal and data units, and reports for the State as required.
- Meetings as required with county (SFHSA, JPD and CBHS) and providers/partners to review programmatic fiscal standing of programs.
- Provision of technical assistance and program support to provider agencies and other partners.
- Attending or participating in CDSS conference calls or meetings as required.

Strategic Planning for Resource Family Recruitment

Background

HSA's Family & Children's Services Division (FCS) oversees the county child protective service functions including the child abuse hotline and investigations, family maintenance and reunification, and permanent placement. The mission of FCS is to protect children, maintain and reunify families, and obtain safe permanent care for children who cannot be reunified with their families.

Resource families provide youth with an opportunity to grow and develop in a family environment. Finding families ready to look after these children is one of the most important responsibilities of the child welfare system. FCS must retain and recruit a pool of well-trained and well-supported resource families, who are willing to take care of children with very diverse profiles and needs.

As of January 2016, San Francisco County had 869 children in out of home care. Of these children, 77 were placed in facility based licensed care (group homes) and 348 were placed in family based licensed care (foster homes) and Relative/NREFM homes, with the remainder split among other placements such as Foster Family Agencies (FFA) and Guardian homes. As such, FCS has a need for a consultant to partner with FCS staff and/or management to immediately develop a new resource family recruitment plan, as well as provide other related services. These efforts will be part of a multi-year, multi-pronged approach geared toward increasing the number of children that will achieve permanency in San Francisco County.

Description of Services

The consultant services will include, but not necessarily be limited to, the following:

A. Data Analysis and Research Services

Gathering and analyzing information regarding current recruitment strategies

In order to formulate a recruitment plan that is responsive to the unique needs of San Francisco and the communities served, the contractor must collect and analyze data from a variety of sources. This will include, but not be limited to:

- Data on current recruitment strategies and techniques, and analysis of strengths, challenges and gaps.
- Community-based data, including demographics, population characteristics, and potential opportunities for additional recruitment efforts within the San Francisco community. This will include identifying target audiences, partners and community groups that may be untapped resources for becoming resource families.
- Data on the experience of current resource families and its impact on recruitment and retention.

The consultant may obtain the information through a variety of methods, including interviews, surveys and focus groups with current or prospective foster parents, outreach to community-based organizations and partners, and agency employees. It is important that the consultant review past recruitment campaigns and best practices from other jurisdictions, including the material used and statistics available.

In accordance with the above described services, the consultant will produce the following deliverables:

- Regularly scheduled meetings with FCS staff to report on progress.

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- Data analysis reports and recommendations to FCS to drive continuous quality improvement of the agency's current recruitment plan.
- Presentations to FCS staff on findings and recommendations.

B. Recruitment Plan Development

The consultant shall design a recruitment and retention plan for resource families based on the data gathered and analyzed and best practice. This may include, but not be limited to:

- Designing a comprehensive resource family recruitment and retention plan, based on the data gathered above, that is specifically tailored to San Francisco's unique strengths and challenges.
- Developing and implementing forums and methods to gather and integrate feedback from staff and community partners on the plan.

C. Marketing/Advertising Development

Under this activity, the consultant will:

- Develop a comprehensive communications and media plan, based on the data gathered above, that engages a variety of community groups, faith based organizations, schools, business, etc. The communications plan should address strategies to reach identified target audiences for resource family recruitment, the proposed budget and evaluation metrics for each major strategy, including:
 - Voice, tone, and call to action;
 - Marketing collateral materials;
 - Community partnership and engagement;
 - Social media;
 - Paid and earned media; and
 - Development of photography, illustration or other graphic treatments.
- Develop graphic templates for key publications and communications materials including program brochures, fact sheets, social media, HSA website and power point presentations.
- Create communications materials in a wide array of formats to assist with implementation of the plan including, but not limited to, press releases, public service announcements, social media strategy, etc.
- Develop an advertising campaign, which will include creative development and electronic format delivery of all materials needed to provide a comprehensive campaign in a variety of formats.
- In consultation with agency staff, distribute creative recruitment materials in a variety of formats, such as brochures, posters, web site developments and updates, and internet site and social media advertisements.

D. Coaching Services

After the recruitment plan has been created, the agency may opt to request coaching services from the consultant to assist in implementation of the plan. The extent of coaching will be determined once the full recruitment plan has been developed and may range from staff trainings to phone consultations with individual staff and/or group units.

III. Submission Requirements

A. Time and Place for Submission of Proposals

Respondents shall submit one (1) electronic PDF copy of the proposal to the following: HSARFP@sfgov.org and david.flores@sfgov.org. Electronic file title should include RFQ number, agency name, number of files submitted i.e. 1 of 4. Proposals must be received by 3:00 p.m., on January 13, 2017. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

Agency staff will confirm receipt of all Respondent submissions within one (1) working day after the deadline for receipt noted above.

Please note: Respondents must submit a separate proposal package for each service offered in the RFQ for which they wish to be considered.

B. Format

For word processing documents, text should be unjustified (i.e., with a ragged-right margin) using a 12 point serif font (e.g., Times Roman, and not Arial), and page margins should be at least 1” on all sides (excluding headers and footers).

C. Content

Organizations interested in responding to this RFQ must submit the following information, in the order specified below. All response packages must be developed using the format below. This is necessary so that all response packages can receive fair and equal evaluation. Response packages not following the required format will not be considered. Information must be at a level of detail that enables effective evaluation and comparison between response packages by the Evaluation Panel. The Agency must ensure that the response package addresses the Selection Criteria.

1. **RFQ Cover Page – (use form provided in Section IX)**

Respondents (or a person authorized to submit the application on behalf of the agency) must sign and submit the cover page confirming that the representations made in the submission are true and accurate.

2. **Table of Contents**

Respondents are to use the Page Number Form provided (Section X) as the proposal table of contents. This form will also be used to assist the review panel in finding the information in the response that corresponds to the evaluation criteria.

3. **Minimum Qualifications –no more than 3 pages**

All responding individual consultants or agencies must provide a *Minimum Qualifications Narrative* describing in detail how the proposing individual or agency meets each of the Minimum Qualifications. Statement that the Respondent is currently a certified vendor with the City and County of San Francisco or is willing and able to become a certified vendor within ten (10) days after notice of intent to award a contract must be included. Any Statements of Qualifications failing to demonstrate that minimum qualifications are met by the Respondent will be considered non-responsive.

4. **Experience and Capacity – no more than 5 pages (not including résumés and job descriptions)** Provide information about your organization and any proposed subcontractors related to the following:

- Describe in detail your (if individual consultant) or your organization's experience, professional qualifications, certificates, skill sets, and capacity in the service area identified in the RFQ for which you have applied.
- For organizations only, describe the key individuals and their roles on your team who will perform the services as outlined in the Scope of Work. Provide résumés for key team members; explain their relevant experience and expertise; describe each member's general roles and responsibilities to achieve the Scope of Services in this RFQ. Include any specific certifications the members of your team possess that uniquely position you to provide the services.

5. **Methodology/Technical Approach – no more than 4 pages**

Individual consultants or agencies should provide a specific, detailed Work Plan that describes how they intend to provide the requested services set forth in the Scope of Services. Provide a detailed explanation how the services will meet the needs of HSA. In the description, please address the following:

- Describe your (if individual consultant) or your organization's general project management approach in addressing planning, development, coordination and delivery of the services for which you have applied under this RFQ.
- Describe in detail how you will provide the services described in the Scope of Services.

6. **Prior Contract History (both public and private) – no more than 2 pages**

Individual consultants or agencies should submit a statement listing at least three (3) relevant contracts with a description of the services, which have been completed during the last three (3) years, along with the relevant contact information to be called as references. The statement must also list any failure or refusal to complete a contract, including details and dates. Provide disclosure of any litigation including Respondent, subcontracts, or any principal officers thereof in connection with any contract or grant.

IV. Evaluation and Selection Criteria

A. Minimum Qualifications

Qualified respondents must possess the minimum qualifications listed below. *(Please note, this information must be provided for you (if individual consultant) or your organization (if this is an agency applicant) and any proposed subcontractors.*

- A minimum of three (3) years of demonstrated experience performing the services in the category identified in the RFQ for which the Respondent is applying
- Familiarity working with and demonstrated knowledge of large public institutions (local, municipal, state or federal government, unions, courts, school districts, college/ universities, etc.)
- Respondent must be a certified vendor with the City and County of San Francisco or able to become a certified vendor within ten (10) days after notice of intent to award a contract

Please note: Agencies submitting proposals that have previously been contracted by the City and County of San Francisco and/ or Federal agencies to provide goods and/or services must successfully demonstrate compliance with performance/monitoring requirements specified in previous grants/contracts (corrective actions) in order to be considered responsive to this RFQ. **Documented failure to correct performance/ monitoring deficiencies identified in past City and County grants/contracts may result in Agency disqualification to participate in this RFQ.**

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Any submission that does not demonstrate that the respondent meets these minimum requirements by the deadline for submittal of proposals will be considered non-responsive.

B. Selection Criteria

A selection committee with expertise in the service areas identified in this RFQ will evaluate the responses. The City intends to evaluate the Qualifications generally in accordance with the criteria itemized below.

Total Possible Points: 100

- 1. Experience and Capacity 45 Points**
 - Satisfactory description of professional qualifications, certificates, skill sets, and capacity in the service area identified in the RFQ for which Respondent has applied (45 points)
- 2. Methodology/Technical Approach 35 Points**
 - Proposed general project management approach is sound and is likely to meet the needs of HSA (15 points)
 - Proposal thoroughly discusses how Respondent would provide the services for which they have applied (20 points)
- 3. Prior Contract History (both public and private) 20 Points**
 - Demonstrated successful performance under contract of work similar nature and scope to the services for which Respondent has applied under this RFQ

Please note: Respondents must attain a minimum passing score of 70 points to be placed on the pre-qualified list for each service offered in this RFQ for which they have applied.

V. Written Questions

A. Written Questions

Respondents are encouraged to submit written questions before the due date indicated below to the individual designated in Section VI.B. All questions will be addressed and any available new information will be provided to respondents via email. All written questions must be submitted on or prior to **3:00 p.m. on December 26, 2016.**

VI. Terms and Conditions for Receipt of Qualifications

A. Errors and Omissions in RFQ

Respondents are responsible for reviewing all portions of this RFQ. Respondents are to promptly notify the Department, in writing, if the respondent discovers any ambiguity, discrepancy, omission, or other error in the RFQ. Any such notification should be directed to the Department promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

B. Inquiries Regarding RFQ

Inquiries regarding the RFQ and all oral notifications of intent to request written modification or clarification of the RFQ, must be directed to:

Contract Manager, GB20
Office of Contract Management
San Francisco Human Services Agency
1650 Mission Street, Suite 300
San Francisco, CA 94103
david.flores@sfgov.org

C. Objections to RFQ Terms

Should a respondent object on any ground to any provision or legal requirement set forth in this RFQ, the respondent must, not more than ten (10) calendar days after the RFQ is issued, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a respondent 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 RFQ, prior to the proposal due date, by issuing Change Notices, which will be posted on the website. The respondent shall be responsible for ensuring that its proposal reflects any and all Change Notices issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the respondent consult the website frequently, including shortly before the proposal due date, to determine if the respondent has downloaded all Change Notices.

E. Revision of Proposal

A respondent may revise a proposal on the respondent's own initiative at any time **before the deadline** for submission of proposals. The respondent must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

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 respondent.

At any time during the proposal evaluation process, the Department may require a respondent to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

F. 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 RFQ or excuse the vendor from full compliance with the specifications of the RFQ or any contract awarded pursuant to the RFQ.

G. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFQ. Submissions of the RFQ will become the property of the City and may be used by the City in any way deemed appropriate.

H. Respondent's Obligations under the Campaign Reform Ordinance

Respondents 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 respondent 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 respondent 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.

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, respondents should contact the San Francisco Ethics Commission at (415) 581-2300.

I. Sunshine Ordinance

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to 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.

J. Public Access to Meetings and Records

If a respondent 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 respondent must comply with Chapter 12L. The respondent must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to respondent's meetings and records, and (2) a summary of all complaints concerning the respondent'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 respondent shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in respondent'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.

K. Reservations of Rights by the City

The issuance of this RFQ 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 Qualifications;
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 RFQ, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFQ by any other means; or
6. Determine that no project will be pursued.

L. No Waiver

No waiver by the City of any provision of this RFQ shall be implied from any failure by the City to recognize or take action on account of any failure by a respondent to observe any provision of this RFQ.

M. Local Business Enterprise Goals and Outreach

Due to county, federal and state funding for these services, LBE bid discounts will not be used in this RFQ.

VII. City Contract Requirements

A. Standard Contract Provisions

The successful respondent will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as Appendix C. 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.

Respondents are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits; the Minimum Compensation Ordinance; the Health Care Accountability Ordinance; the First Source Hiring Program; and applicable conflict of interest laws, as set forth in paragraphs B, C, D, E and F below.

B. Nondiscrimination in Contracts and Benefits

The successful respondent 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 www.sfcMD.org.

C. Minimum Compensation Ordinance (MCO)

The successful respondent 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 respondent 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://www.workforcedevelopmentsf.org/> and from the First Source Hiring Administrator, (415) 401-4960.

F. Conflicts of Interest

The successful respondent 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 respondent 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 respondent 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 respondent that the City has selected the respondent.

VIII. Standard Forms

Before the City can award any contract to a contractor, that contractor must file three standard City forms (items 1-3 on the chart). Because many contractors have already completed these forms, and because some informational forms are rarely revised, the City has not included them in the RFQ package. Instead, this Appendix describes the forms, where to find them on the Internet (see bottom of page 2), and where to file them. If a contractor cannot get the documents off the Internet, the contractor should call (415) 554-6248 or e-mail Purchasing (purchasing@sfgov.org) and Purchasing will fax, mail or e-mail them to the contractor.

If a contractor has already filled out items 1-3 (see note under item 3) on the chart, **the contractor should not do so again unless the contractor's answers have changed.** To find out whether these forms have been submitted, the contractor should call Vendor File Support in the Controller's Office at (415) 554-6702.

If a contractor would like to apply to be certified as a local business enterprise, it must submit item 4. To find out about item 4 and certification, the contractor should call Contract Monitoring Division at (415) 252-2500.

Item	Form name and Internet location	Form	Description	Return the form to; For more info
1.	Request for Taxpayer Identification Number and Certification	W-9	The City needs the contractor's taxpayer ID number on this form. If a contractor has already done	Controller's Office Vendor File Support City Hall, Room 484

Request for Qualifications #726 for Master Consulting Services for the Human Services Agency

Item	Form name and Internet location	Form	Description	Return the form to; For more info
	http://sfgsa.org/index.aspx?page=4762 www.irs.gov/pub/irs-fill/fw9.pdf		business with the City, this form is not necessary because the City already has the number.	San Francisco, CA 94102 (415) 554-6702
2.	Business Tax Declaration http://sfgsa.org/index.aspx?page=4762	P-25	All contractors must sign this form to determine if they must register with the Tax Collector, even if not located in San Francisco. All businesses that qualify as "conducting business in San Francisco" must register with the Tax Collector	Controller's Office Vendor File Support City Hall, Room 484 San Francisco, CA 94102 (415) 554-6702
3.	S.F. Administrative Code Chapters 12B & 12C Declaration: Nondiscrimination in Contracts and Benefits http://sfgsa.org/index.aspx?page=4762 In Vendor Profile Application	CMD-12B-101	Contractors tell the City if their personnel policies meet the City's requirements for nondiscrimination against protected classes of people, and in the provision of benefits between employees with spouses and employees with domestic partners. Form submission is not complete if it does not include the additional documentation asked for on the form. Other forms may be required, depending on the answers on this form. Contract-by-Contract Compliance status vendors must fill out an additional form for each contract.	Human Rights Comm. 25 Van Ness, #800 San Francisco, CA 94102-6059 (415) 252-2500
4.	CMD LBE Certification Application http://www.sfgsa.org/index.aspx?page=6058 In Vendor Profile Application		Local businesses complete this form to be certified by CMD as LBEs. Certified LBEs receive a rating bonus pursuant to Chapter 14B when bidding on City contracts if applicable. To receive the bid discount, you must be certified by CMD by the proposal due date.	Contract Monitoring Unit 30 Van Ness Avenue, Suite 200 San Francisco, CA 94102 Phone: (415) 581-2310

Where the forms are on the Internet

Office of Contract Administration

Homepage: www.sfgov.org/oca/
 Purchasing forms: Click on "Required Vendor Forms" under the "Information for Vendors and Contractors" banner.

Contract Monitoring Division

CMD's homepage: <http://sfgsa.org/index.aspx?page=5365>
 Equal Benefits forms: <http://sfgsa.org/index.aspx?page=5359>
 LBE certification form: <http://sfgsa.org/index.aspx?page=5364#Section%20V>

IX. San Francisco Human Services Agency RFQ Cover Page

NAME OF INDIVIDUAL OR ORGANIZATION: _____

IF ORGANIZATION, CONTACT PERSON NAME & TITLE: _____

ADDRESS: _____

PHONE/FAX#: _____

EMAIL: _____

FEDERAL EMPLOYER #: _____

CITY VENDOR #: _____

SERVICE CATEGORY APPLIED FOR IN THIS PROPOSAL: _____

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to HSARFP@sfgov.org and david.flores@sfgov.org

Request for Qualifications #726 for Master Consulting Services for the Human Services Agency

X. San Francisco Human Services Agency Page Number Form

This form is also used to assist the review panel in finding the information in the response that corresponds to the evaluation criteria. For each item listed below, please list the page number(s) where the reviewer may find the answer(s) to the criteria.

	Evaluation and Selection Criteria	Page Number(s)
A.	Minimum Qualifications	
	A minimum of three (3) years of demonstrated experience performing the services in the category identified in the RFQ for which the Respondent is applying	
	Familiarity working with and demonstrated knowledge of large public institutions (local, municipal, state or federal government, unions, courts, school districts, college/ universities, etc.)	
	Statement that the Respondent is currently a certified vendor with the City and County of San Francisco or is willing and able to become a certified vendor within ten (10) days after notice of intent to award a contract.	
B1	Experience and Capacity (45 Points)	
	Satisfactory description of professional qualifications, certificates, skill sets, and capacity in the service area identified in the RFQ for which Respondent has applied (45 points)	
B2	Methodology/Technical Approach (35 Points)	
	Proposed general project management approach is sound and is likely to meet the needs of HSA (15 points)	
	Proposal thoroughly discusses how Respondent would provide the services for which they have applied (20 points)	
B3	Prior Contract History (both public and private) (20 Points)	
	Demonstrated successful performance under contract of work similar nature and scope to the services for which Respondent has applied under this RFQ	

Prior or Similar Approved PSC



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

Sent via Electronic Mail

June 24, 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 46791-13/14, 49377-13/14, 46974-13/14, 40525-13/14, 47803-13/14, 47911-13/14, 49509-13/14, 42163-13/14, 42385-13/14, 47609-13/14, 48143-13/14, 44299-13/14, 2003-08/09, 2005-08/09, 4047-13/14, 4136-08/09, 4055-10/11, 4133-08/09 AND 4098-02/03.

At its meeting of June 16, 2014 the Civil Service Commission had for its consideration the above matter.

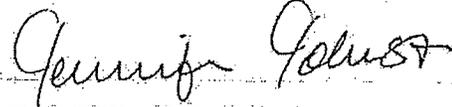
The Commission took the following actions:

- 1) Approved PSC #47083-13/14, with the condition that the Department of Public Health work with the Executive Officer to amend the PSC Form 1 to expand on the justification for contracting out, to be clear that it will not result in any displacements, and to correct the reference to the prior PSC under which those or related services were previously contracted out.
- 2) Approved PSC #42163-13/14, with the condition that the Public Utilities Commission work with the Executive Officer to amend the PSC Form 1 to expand on the definition of the scope of work being contracted out.
- 3) Approved PSC #42385-13/14, with the proviso that the Public Utilities Commission amends the description on the PSC Form 1 to make it clear that the request is for a contractor to provide on-site training and specialized work (not to provide laborer worker to avoid hiring laborers)
- 4) ~~Conditionally approved~~ PSC #2003-08/09, provided that the Human Services Agency and the employee organization (SEIU, Local 1021) continue their discussions on the PSC, and provided that the Human Services Agency submits a written report to the Commission by October 2014 on those discussions.
- 5) Approved PSC #4047-13/14, on the condition that the Municipal Transportation Agency works with the Executive Officer to update the PSC Form 1 to include information on why the contract was extended out further than originally anticipated.

- 6) Approved PSC #4133-08/09, on the condition that the Department of Public Health amends PSC Form 1 to clearly define the description of work being contracted out, and that it continues discussions with the affected union(s).
- 7) Approved the request for all remaining PSCs (PSC numbers 46791-13/14, 49377-13/14, 46974-13/14, 40525-13/14, 47911-13/14, 49509-13/14, 47609-13/14, 48143-13/14, 44299-13/14, 2005-08/09, 4136-08/09, 4055-10/11, and 4098-02/03).
- 8) Adopted the report; notified the Office of the Controller and the Office of Contract Administration.

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: Parveen Boparai, Municipal Transportation Agency
David Curtó, Human Service Agency
Cynthia Hamada, Municipal Transportation Agency
Jacquie Hale, Department of Public Health
Lavena Holmes, San Francisco Port Commission
Shamica Jackson, Public Utilities Commission
Greg Kato, Treasurer & Tax Collector Office
Stacey Lo, Public Utilities Commission
Danny Yeung, City Planning Department
Ben Rosenfield, Controller's Office
Jaci Fong, Contract Administration
Commission File
Chron

the department clarify at the meeting of June 16th what “piggybacking on the Airport” means; and Commissioner Favetti also requested that the department provide clarification on pages 5 and 7 of the department’s submission with regard to the training and notification to SEIU, Local 1021. (Vote of 5 to 0)

Recommendation: Adopt the report. Approve the request for Personal Services Contract #4070-09/10; Notify the Office of the Controller and the Office of Contract Administration.

(11) Review of Request for Approval of Proposed Personal Services Contract Number 30933-13/14. (File No. 0131-14-8) – Action Item

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
30933-13/14	Sheriff	Current Approved Amount \$65,000 Increase Amount Requested \$70,000 New Total Amount Requested \$135,000	Operate a shuttle service from Civic Center BART station and Balboa Park BART station to San Bruno Jail. The shuttle service operates on weekends and all major holidays from 7:00am - 2:30pm.	Modification	Current Approved Duration 4/1/14-3/31/2015

June 2, 2014: Continued Personal Services Contract #30933-13/14 to the Commission meeting of June 16, 2014 so that the Sheriff’s Department can provide proper notice to the Transport Workers Union Local 250A. (Vote of 5 to 0)

Recommendation: Adopt the report. Approve the request for proposed Personal Services Contract #30933-13/14; Notify the Office of the Controller and the Office of Contract Administration.

(12) Human Services Agency’s Annual Report on Contracts Awarded under Personal Services Contracts with Continuing Approval—Personal Services Contracts Numbers 2000-08/09 through 2009-08/09. (File No. 0120-14-8) – Action Item

PSC#	Department	Amount	Type of Service	Duration
2000-08/09	Human Services Agency	Per Term \$7,500,00 Per Annual \$1,500,000	Recruiting appropriate families throughout the Bay Area and other counties, providing orientations, induction training, home studies, and post-adoption services to the families, and facilitating the matching of adoptive families to San Francisco children in the foster care system.	7/1/2009 – Continuing
2001-08/09	Human Services Agency	Per Term \$65,000,000 Per Annual \$13,000,000	Services include recruitment and support to perspective and existing foster and kinship parents. These services provide training, respite care, counseling, crisis intervention, childcare and reunification efforts to help maintain foster children in their communities. Services provided to children in foster care; include therapeutic services, tutoring, and independent living skills, mental and general health services.	7/1/2009 – Continuing
A 2003-08/09	Human Services	Current Approved Amount \$160,000,000	Multiple contractors provide childcare services to low-income and CalWORKs families through partnerships with other state licensed providers in various identified target neighborhoods.	1/5/2009- Continuing

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CITY PLANNING -- CPC

Dept. Code: CPC

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

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

Type of Service: Community and Public Space Design

Funding Source: General Funds

PSC Amount: \$1,000,000

PSC Est. Start Date: 10/31/2018

PSC Est. End Date 10/31/2022

1. Description of Work

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

Consultant will work with City staff and neighborhood groups, businesses, individuals, and other interested community organizations to implement, design, install, maintain, and potentially fiscally sponsor Groundplay projects as identified by the City and County of San Francisco. Each Groundplay project is intended to be publicly accessible and is temporary (and reversible when necessary) in nature to test new ideas in the public spaces.

Scope of work includes but is not limited to: procurement of materials, installation of fixtures, maintenance of plantings and project features, coordination with the public, etc. All work will be approved and overseen by City and County of San Francisco staff prior to and throughout the life of each Groundplay project.

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

The as-needed services are necessary to assist the Planning Department (and other City agencies) with providing temporary projects to test new ideas in the public space. Denial of this service would result in the inability to test options in a real-world scenario and would hinder the ability to effectively and efficiently respond to constituent requests.

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 an earlier approved PSC 35583 -13/14

D. Will the contract(s) be renewed?

This contract/grant could be renewed, based on the outcomes.

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 that needs diverse skills, expertise and knowledge.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Skills and expertise required include technical expertise and experience in working with local neighborhood groups, businesses, individuals, and other interested organizations in implementing similar projects. They would be responsible for guiding such organizations through the City's approval process, fiscal sponsorship, project administration, administration of funding, and formalizing agreements with such organizations. They require extensive local knowledge/familiarity with neighborhood partners their needs.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5277, Planner 1; 5278, Planner 2; 5291, Planner 3;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: no

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

The Department reviewed its staffing roles and responsibilities, and also other similar contracts and/or grants with other departments, and has determined that an organization is needed to serve as technical assistance provider and fiscal sponsor for local neighborhood groups, business, individuals, and other interested organizations.

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

- A. Explain why civil service classes are not applicable.
The Department reviewed its staffing roles and responsibilities, and also other similar contracts and/or grants with other departments, and has determined that an organization is needed to serve as technical assistance provider and fiscal sponsor for local neighborhood groups, business, individuals, and other interested organizations.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt new civil service classes to provide technical assistance and serve as a fiscal sponsor for sporadic projects of this nature.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. The contractor will not train employees. This contract is intended to provide services to the City, not to train personnel.
- 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 08/08/2018, 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: Deborah Landis Phone: 415-575-9118 Email: Deborah.Landis@sfgov.org

Address: 1650 Mission Street, Suite 400 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44102 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/15/2018

Receipt of Union Notification(s)

Landis, Deborah (CPC)

From: DHR-PSCCoordinator, DHR (HRD) on behalf of La, Belle (CPC)
Sent: Wednesday, August 08, 2018 4:01 PM
To: La, Belle (CPC); 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; La, Belle (CPC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44102 - 18/19

RECEIPT for Union Notification for PSC 44102 - 18/19 more than \$100k

The CITY PLANNING -- CPC has submitted a request for a Personal Services Contract (PSC) 44102 - 18/19 for \$1,000,000 for Initial Request services for the period 10/31/2018 – 10/31/2022. 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/11837> 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: CITY PLANNING Dept. Code: CPC

Type of Request: [] Initial [x] Modification of an existing PSC (PSC # 35583 - 13/14)

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

Type of Service: Pavement to Parks Program Technical Assistance and Neighborhood Sponsor

Funding Source: General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 12/01/13 - 10/31/18 (4 years 47 w

PSC Mod#1 Amount: \$300,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$800,000 PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$1,200,000 PSC Cumulative Duration Proposed: 4 years 47 weeks

1. Description of Work

A. Scope of Work:

Within the Pavement to Parks Program, a non-profit organization will serve as technical assistance provider and fiscal sponsor for local neighborhood groups, businesses, individuals, and other interested organizations to facilitate the discussions, community design, funding, implementation, and maintenance of Pavement to Parks projects. The Technical Assistance and Neighborhood Sponsor will facilitate and establish partnerships with interested neighborhood organizations.

Before any funds are to be committed or temporary installations, the Technical Assistance and Neighborhood Sponsor must establish a Memorandum of Understanding (MOU) with such interested local neighborhood groups, business, or other organization, with prior review and approval by the Planning Department Liaison.

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

This service is necessary to provide technical assistance and serve as a fiscal sponsor to local neighborhood groups, businesses, individuals, and other interested organizations. Denial will result in significant administrative burden for local neighborhood groups, business, individuals, and other interested organizations wishing to establish a formal agreement and funding mechanism to implement a specific Pavement to Parks project in their local neighborhood.

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.

Services have been provided in the past through earlier PSC request. See 35583 - 13/14

D. Will the contract(s) be renewed? This contract/grant could be renewed, based on the outcomes.

2. Union Notification: On 05/27/16, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Management & Superv Local 21; Architect & Enginee

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35583 - 13/14

DHR Analysis/Recommendation:

07/18/2016

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 07/18/2016

07/18/2016

July 2013

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Skills and expertise required include technical expertise and experience in working with local neighborhood groups, businesses, individuals, and other interested organizations in implementing similar projects. They would be responsible for guiding such organizations through the City's approval process, fiscal sponsorship, project administration, administration of funding, and formalizing agreements with such organizations. They require extensive local knowledge/familiarity with neighborhood partners their needs.

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

5278,5291,

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

No.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

The Department reviewed its staffing roles and responsibilities, and also other similar contracts and/or grants with other departments, and has determined that an organization is needed to serve as technical assistance provider and fiscal sponsor for local neighborhood groups, business, individuals, and other interested organizations.

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

It would not be practical to adopt new civil service classes to provide technical assistance and serve as a fiscal sponsor for sporadic projects of this nature.

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?
None, additional training is not necessary | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? San Francisco Parks Alliance | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 05/27/16 BY:

Name: Belle La Phone: 415-575-6833 Email: belle.la@sfgov.org

Address: 1650 Mission St, Suite 400 San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CITY PLANNING -- CPC

Dept. Code: CPC

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

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

Type of Service: Economic Consulting

Funding Source: Planning Department Budget

PSC Amount: \$750,000

PSC Est. Start Date: 11/01/2018 PSC Est. End Date 10/31/2022

1. Description of Work

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

The Planning Department is seeking to utilize the Controller's Office and Office of Economic and Workforce Development pre-qualified pool for economic consultant services. Selected consultant(s) will provide as-needed professional services which will include, but are not limited to fiscal and economic impact analysis, financial feasibility assessment, impact fee nexus analysis, real estate analysis, labor market analysis, economic development strategy, and economic research. Potential projects could include Citywide development impact fee and transit sustainability fee nexus study/ies, infrastructure level-of-service analysis, financial feasibility studies for new development, triple bottom line analysis and modelling, cost-benefit analysis, and other similar studies.

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

The as-needed services are necessary to assist the Planning department with updating the Citywide Nexus Analysis and Transit Sustainability Fee Nexus Study. The California Mitigation Fee Act requires the nexus study to be updated every five years. Denial of this service would result in an incomplete update to the nexus study for the existing citywide impact fee program. The previous study was completed in 2014. If this contract is approved, Planning would be able to complete this study in 2019, meeting the state mandated update terms. The study will also be used to inform capital planning and prioritization for the City's 10-Year Capital Plan, such that the city can identify and prioritize capital improvements to address existing deficiencies and inequities.

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.

Prior to RFQ#CON2016-26 economic consulting services would have been procured from RFQ#CON2014-14. The Civil Service Commission would have approved any contracts that came from either RFQ. Both RFQs are/were available for all City departments to use.

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:

The proposed economic analyses will be for short-term projects that require specific expertise and knowledge.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The required skills and expertise are listed in the Controller's Office solicitation (linked above), RFQ#CON2016-26 Economic Consulting Services listed on pages 3 to 4.

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 5278, Planner 2; 5283, Planner 5; 5291, Planner 3; 5293, Planner 4;

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

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

These services are highly specialized and are not available from 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.

Civil service classes are not applicable due to the highly specialized nature of these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It is not practical to adopt a new civil service class to perform work for very specialized, rarely-needed economic analyses.

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 employees. The contractor will provide economic consulting services, which does not include training personnel.

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 08/24/2018, 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: Deborah Landis Phone: 415-575-9118 Email: Deborah.Landis@sfgov.org

Address: 1650 Mission St., Suite 400 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45510 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/15/2018

Receipt of Union Notification(s)

Landis, Deborah (CPC)

From: dhr-psccordinator@sfgov.org on behalf of Deborah.Landis@sfgov.org
Sent: Friday, August 24, 2018 1:10 PM
To: Landis, Deborah (CPC); ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Landis, Deborah (CPC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 45510 - 18/19

RECEIPT for Union Notification for PSC 45510 - 18/19 more than \$100k

The Dept Title -- Dept has submitted a request for a Personal Services Contract (PSC) 45510 - 18/19 for \$750,000 for Initial Request services for the period 11/01/2018 – 10/31/2022. 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/11902> 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: FIRE DEPARTMENT

Dept. Code: FIR

Type of Request: Initial Modification of an existing PSC (PSC # 43352 - 13/14)

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

Type of Service: Emergency Medical Service (EMS) Billing & Revenue Services

Funding Source: Gov't, private health insurance

PSC Original Approved Amount: \$1,500,000 PSC Original Approved Duration: 07/01/14 - 06/30/18 (4 years)

PSC Mod#1 Amount: \$1,500,000 PSC Mod#1 Duration: 07/01/18-06/30/22 (4 years 1 day)

PSC Cumulative Amount Proposed: \$3,000,000 PSC Cumulative Duration Proposed: 8 years 1 day

1. Description of Work

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

Provide complete billing and collection services for all Fire Department paramedic ambulance activities. Receive secured data of Department's Electronic Patient Care Reports and transmittal into billing system; data input, scanning and entry of paper pre-hospital care records; coding and medical necessity leveling of incidents; patient contact for follow-up collections; bill and invoice creation, generation, and distribution; industry research on fee structures and

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

This highly specialized and complex billing services generates revenue to support EMS and paramedic ambulance services in the Fire Department. Denial of this service will result in the loss of revenue exceeding \$20 million annually. Loss of these revenue funds will create the need for a draw on the City's General Fund.

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

Yes, it has via PSC

D. Will the contract(s) be renewed?

Yes, up to a seven-year total duration.

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 service involves large volume of data set-up and transfer of confidential patient and insurance information. Thereafter, there will be a continuous flow of large volumes of data from current, confidential patient and insurance information. Data will come from many sources, such as the Department's ambulance units, Federal Medicare, State Medi-Cal and private insurances. It is critical that the same vendor under the same contract be in place for at least four years to ensure accurate, timely, continuous and consistent billing and collection services for the

Department's ambulance activities. This modification is not for more than four years, but combined with the original approval, the contract term will be eight years.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The Department does not have sufficient staff, office space, facilities to conduct this work; nor does the specialized expertise exist in the Department

B. Reason for the request for modification:

This modification is an extension of the original period and an increase to the overall approved contract amount. The actual contract has options to extend that the Department would like to have the opportunity to exercise.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Please see complete description as an attachment.

B. Which, if any, civil service class(es) normally perform(s) this work? 1630, Account Clerk; 1635, Health Care Billing Clerk 1; 1636, Health Care Billing Clerk 2; 1637, Patient Accounts Clerk; 1663, Patient Accounts Supervisor;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Civil service classes cannot perform the full range of EMS billing and collection of this scope and magnitude. The Department generates over 60,000 accounts per year. No infrastructure exists within the City or the Department to support the resources needed for the full range of services (coding, billing, payment, auditing, insurance).

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be operationally prudent and practicable for the City to establish, maintain and staff an infrastructure that could perform the full range of EMS billing and collection duties for the Department.

6. Additional Information

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

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
There is no training provided to employees. Patients will be dealing directly with contractor for billing issues.
- 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.
Fire Commission approval
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
The current contract has options to extend

7. **Union Notification:** On 07/11/18, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous;

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

Name: Elaine Walters Phone: (415)558-3418 Email: elaine.walters@sfgov.org

Address: 698 Second Street, Room 209, San Francisco, CA 94107

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43352 - 13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/15/2018

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of elaine.walters@sfgov.org
Sent: Wednesday, July 11, 2018 11:33 AM
To: Walters, Elaine (FIR); Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC);
pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org;
pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com;
ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA);
david.canham@seiu1021.org; jtanner940@aol.com; Corso, Mark; DHR-PSCCoordinator,
DHR (HRD)
Subject: Receipt of Modification Request to PSC # 43352 - 13/14 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The FIRE DEPARTMENT -- FIR has submitted a modification request for a Personal Services Contract (PSC) for \$1,500,000 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/11713>

Email sent to the following addresses: jtanner940@aol.com david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org xiumin.li@seiu1021.org ablood@cirseiu.org davidmkersten@gmail.com ted.zarzecki@seiu1021.net pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org pcamarillo_seiu@sbcglobal.net Kbasconcillo@sfgov.org Ricardo.lopez@sfgov.org

Additional Attachment(s)

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:

Minimum of 5 years health care receivables industry experience, 2 years must be in EMS collections; provision and implementation of electronic patient data care collection; compliant with all Health Insurance Portability & Accountability Act (HIPAA) and privacy regulations. Proposer and its employees, current and future, cannot be on the Federal Office of Inspector General (OIG) Exclusion list. Specific systems experience in National Highway Transportation Safety Administration Uniform Pre-Hospital EMS dataset P2.1 or higher, including implementation of the standard's XML specifications.

B. Which, if any, civil service class normally performs this work?

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

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable:

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

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

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

<u>Yes</u>	<u>No</u>
<input type="checkbox"/>	<input type="checkbox"/>

B. Will the contractor train City and County employees?

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

- Describe the training and indicate approximate number of hours.
- Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate numbers to be trained.

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

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

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

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

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

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

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

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

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

Signature of Departmental Personal Services Contract Coordinator

Print or Type Name

Telephone Number

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: FIRE DEPARTMENT -- FIRDept. Code: FIRType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Emergency Medical Service (EMS) Billing & Revenue ServicesFunding Source: Gov't, private health insurancePSC Amount: \$1,500,000PSC Est. Start Date: 07/01/2014PSC Est. End Date: 06/30/2018**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Provide complete billing and collection services for all Fire Department paramedic ambulance activities. Receive secured data of Department's Electronic Patient Care Reports and transmittal into billing system; data input, scanning and entry of paper pre-hospital care records; coding and medical necessity leveling of incidents; patient contact for follow-up collections; bill and invoice creation, generation, and distribution; industry research on fee structures and "usual and customary" rates; maintain fluency in payer class allowances, as well as changes and updates in the federal reimbursement structures and fee schedules; analyze revenue and provide assessments and projections to financial staff. Provide and assist with maintaining electronic field data capture system for use by field personnel; collection of Continuous Quality Improvement information.

The duration of the contract is for four years only, through 2018. However, the Department may seek to exercise one or both two-year extension options in the future by obtaining modification approval from DHR and/or Civil Service Commission.

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

This highly specialized and complex billing services generates revenue to support EMS and paramedic ambulance services in the Fire Department. Denial of this service will result in the loss of revenue exceeding \$20 million annually. Loss of these revenue funds will create the need for a draw on the City's General Fund.

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 type of service was previously approved by the Civil Service Commission at its meeting of May 15, 2006 (PSC# 4117-05/06). That contract lasted for four years.

D. Will the contract(s) be renewed?

Yes, up to a seven-year total duration.

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 service will initially involve large volume of data set-up and transfer of confidential patient and insurance information. Thereafter, there will be a continuous flow of large volumes of data from current, confidential patient and insurance information. Data will come from many sources, such as the Department's ambulance units, Federal Medicare, State Medi-Cal and private insurances. It is critical that the same vendor under the same contract be in place for at least four years to ensure accurate, timely, continuous and consistent billing and collection services for the Department's ambulance activities.

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 Department does not have sufficient staff, office space, facilities to conduct this work; nor does the specialized expertise exist in the Department

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Please see complete description as an attachment.

B. Which, if any, civil service class(es) normally perform(s) this work? 1630, Account Clerk; 1635, Health Care Billing Clerk 1; 1636, Health Care Billing Clerk 2; 1637, Patient Accounts Clerk; 1663, Patient Accounts Supervisor;

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

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

There are no available resources within the City that could handle the full range of EMS billing and collection of this scope and magnitude.

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 cannot perform the full range of EMS billing and collection of this scope and magnitude. The Department generates over 60,000 accounts per year. No infrastructure exists within the City or the Department to support the resources needed for the full range of services (coding, billing, payment, auditing, insurance).

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it would not be operationally prudent and practicable for the City to establish, maintain and staff an infrastructure that could perform the full range of EMS billing and collection duties for the Department.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. There is no training provided to employees. Patients will be dealing directly with contractor for billing issues.

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

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

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

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 11/19/2013, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous

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

Name: Elaine Walters Phone: (415)558-3418 Email: elaine.walters@sfgov.org

Address: 698 Second Street, Room 209 San Francisco, CA 94107

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43352 - 13/14

DHR Analysis/Recommendation:

action date: 03/03/2014

Commission Approval Required

Approved by Civil Service Commission with conditions

03/03/2014 DHR Approved for 03/03/2014

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 48070 - 13/14)

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

Type of Service: Assistance to Clients with Federal and Other Income Assistance Programs

Funding Source: Work Order

PSC Original Approved Amount: \$6,504,869

PSC Original Approved Duration: 04/01/14 - 06/30/18 (4 years 13 weeks)

PSC Mod#1 Amount: \$12,000,000

PSC Mod#1 Duration: 07/01/18-06/30/22 (4 years 1 day)

PSC Cumulative Amount Proposed: \$18,504,869

PSC Cumulative Duration Proposed: 8 years 13 weeks

1. Description of Work

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

Contractor will utilize its legal staff to provide representation directly to clients to maximize client income in order to stabilize client living situations and provide client access to healthcare. The Department of Public Health (DPH) provides these advocacy services in administrative hearings and related legal processes in collaboration with the Human Services Agency (HSA) and other service providers; as these agencies are often serving the same clients, and among these partners, DPH Behavioral Health Services (BHS) contributes its clear experience and expertise in serving clients with behavioral health and HIV/AIDS diagnoses. Clients will be received primarily from referrals from HSA, DPH (civil service) mental health centers and/or providers serving People Living with HIV/AIDS (PLWHA) in San Francisco, and who are uninsured, underinsured, or at risk of losing insurance, in order to obtain or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage. Clients likely will include people who have multiple diagnoses, have been incarcerated, have documented substance use disorders, who are homeless, single parents, people of color, immigrants, women, and/or part of the Lesbian/Gay/ Bisexual/Transgender (LGBT) community, and may be monolingual or limited English-speaking, with fluency in a range of languages, including Spanish, Cantonese, Mandarin and Tagalog.

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

Clients eligible for SSI and other income assistance programs are more likely to become engaged in ongoing and preventive treatment, are more likely to have access to housing, and tend to better meet their nutritional needs. Denial of those services will result in an increase in disease, poor nutrition, homelessness, and crime.

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

yes

D. Will the contract(s) be renewed?
Yes, if funding is available.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
The Department expects the need for these services to continue, as these services enable our clients to increase their income and improve their living conditions when they are able to successfully begin receiving SSI/SSDI benefits.

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 specialized legal services are provided on an as-needed basis as clients present themselves needing representation in order to get on SSI/SSDI, especially in helping with appeals.

B. Reason for the request for modification:
increase amount and extend term

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Demonstrated legal expertise in Social Security Administration disability criteria, evidentiary rules and application process; demonstrated experience in providing legal representation for clients through the legal appeal and hearing stages.

B. Which, if any, civil service class(es) normally perform(s) this work? 2903, Eligibility Worker; 2905, Senior Eligibility Worker; 2907, Eligibility Worker Supervisor;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

There are no current civil service classes established to provide these services, which are provided only to clients with behavioral and other illnesses (not to employees or departments).

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, as the services are as-needed and intermittent, depending on individual clients' needs.

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.

While the purpose of this PSC is not training, there may be some knowledge transfer, as the contractor works closely with civil service employees.

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

No.

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

No.

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

No.

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

No.

7. Union Notification: On 05/25/18, the Department notified the following employee organizations of this PSC/RFP request:

SEIU 1021 Miscellaneous;

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

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

Address: 101 Grove Street, Room 307, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48070 - 13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/15/2018

Receipt of Union Notification(s)

Hale, Jacquie (DPH)

From: dhr-psccordinator@sfgov.org on behalf of jacquie.hale@sfdph.org
Sent: Friday, May 25, 2018 5:44 PM
To: Hale, Jacquie (DPH); Ricardo.lopez@sfgov.org; Basconcillo, Katherine (PUC);
pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org;
pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com;
ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA);
david.canham@seiu1021.org; jtanner940@aol.com; Girma, Mahlet (DPH); DHR-
PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 48070 - 13/14 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$12,000,000 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/11098>

Email sent to the following addresses: jtanner940@aol.com david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org
xiumin.li@seiu1021.org ablood@cirseiu.org davidmkersten@gmail.com ted.zarzecki@seiu1021.net
pscreview@seiu1021.org Wendy.Frigillana@seiu1021.org pcamarillo_seiu@sbcglobal.net Kbasconcillo@sfgwater.org
Ricardo.lopez@sfgov.org

From: [Hale, Jacquie \(DPH\)](#)
To: ["XiuMin Li"](#)
Cc: [Moreno, Mario C \(DPH\)](#)
Subject: RE: PSC# 48070 - 13/14
Date: Tuesday, September 25, 2018 4:53:00 PM
Attachments: [image001.png](#)

XiuMin,

Hi. We need to request that this PSC be calendared for the October 15, 2018, meeting of the Civil Service Commission. If you have any additional edits to the Scope Of Work, please send your suggestions to me ASAP so that we can review them quickly and revise the PSC in the PSC database.

Thank you,

Jacquie Hale
Manager, Office of Contracts Management and Compliance, DPH Business Office
1380 Howard Street #421B / San Francisco, CA 94103 / Jacquie.Hale@SFDPH.org
(415) 255-3508

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From: Hale, Jacquie (DPH)
Sent: Wednesday, September 19, 2018 11:59 AM
To: 'XiuMin Li' <XiuMin.Li@seiu1021.org>
Cc: DHR Info <SF-DHR-Info@seiu1021.org>; Moreno, Mario C (DPH) <mario.c.moreno@sfdph.org>; Jessica Inouye <Jessica.Inouye@seiu1021.org>
Subject: RE: PSC# 48070 - 13/14

XiuMin,

Hi. Here is the revised version of PSC 48070-13/14 (attached "PSC 48070-1314 SSI Adv – revised"), which I think responds to your concerns which we discussed at our meeting.

For your reference, also attached is the PSC as we had originally sent it to you ("48070-13/14 Mod 1").

The notes of our meeting are attached, as well ("48070-1314 SSI Adv - Notes Mtg wSEIU 7-10-18").

Thank you,

Jacquie
(415) 255-3508

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From: XiuMin Li <XiuMin.Li@seiu1021.org>
Sent: Thursday, August 09, 2018 5:05 PM
To: Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>
Cc: DHR Info <SF-DHR-Info@seiu1021.org>; Moreno, Mario C (DPH) <mario.c.moreno@sfdph.org>; Dasilva, Nina (DPH) <nina.dasilva@sfdph.org>; Jessica Inouye <Jessica.Inouye@seiu1021.org>; Girma, Mahlet (DPH) <mahlet.girma@sfdph.org>
Subject: RE: PSC# 48070 - 13/14

Hi Jacquie,
What's the status on revising this scope of services to better reflect the legal work that's being done?

Thanks,

XiuMin Li
Field Supervisor
SEIU 1021

Member Resource Center (MRC): 1-877-687-1021
Direct: 415-848-3686
SF Office Fax: 415-431-6241

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

From: Hale, Jacquie (DPH) [<mailto:jacquie.hale@sfdph.org>]
Sent: Monday, July 23, 2018 3:44 PM
To: XiuMin Li
Cc: DHR Info; Moreno, Mario C (DPH); Dasilva, Nina (DPH); Jessica Inouye; Girma, Mahlet (DPH)
Subject: RE: PSC# 48070 - 13/14

Xiu Min,

Thanks for following up. We are working on the revised scope of work and expect to send it to you in the next couple of days.

Thanks,

Jacque
(415) 255-3508

This e-mail is not a secured data transmission for Protected Health Information (PHI) as defined by the Healthcare Portability and Accountability Act (HIPAA), and it is the responsibility of all parties involved to take all reasonable actions to protect this message from non-authorized disclosure. This e-mail is intended for the recipient only. If you receive this e-mail in error, you should notify the sender and destroy the e-mail immediately. Disclosure of the information contained herein could subject to disclosure to civil or criminal penalties under state and federal privacy laws.

From: XiuMin Li <XiuMin.Li@seiu1021.org>
Sent: Monday, July 23, 2018 12:01 PM
To: Girma, Mahlet (DPH) <mahlet.girma@sfdph.org>; Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>
Cc: DHR Info <SF-DHR-Info@seiu1021.org>; Moreno, Mario C (DPH) <mario.c.moreno@sfdph.org>; Dasilva, Nina (DPH) <nina.dasilva@sfdph.org>; Jessica Inouye <Jessica.Inouye@seiu1021.org>
Subject: RE: PSC# 48070 - 13/14

Hello,

I want to follow up regarding this PSC. After our meeting, it was agreed that the scope of service should be limited to second level legal advocacy by attorneys who specialize in SSI client advocacy. As it is currently written the scope of service falls within the scope of work that is currently performed by 2916 Social Work Specialist. Jacquie was going to rewrite the scope of service in order to more accurately captures this. Please let me know where you are at.

Thanks,

XiuMin Li
Field Supervisor

SEIU 1021 SF Office
350 Rhode Island, South Building Suite 100
San Francisco, CA 94103

Phone: 415-848-3686
Fax: 415-431-6241

Member Resource Center (MRC): 1-877-687-1021
For updates on what's happening with the union, visit us at <http://www.seiu1021.org/>

[Get the latest news on the SEIU 1021 Member Convention here](#)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 48070 - 13/14)

Request:

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

Approval: Expedited Continuing

Type of Service: Assistance to Clients with Federal and Other Income Assistance Programs

Funding Source: Work Order

PSC Original Approved Amount: \$6,504,869 PSC Original Approved Duration: 04/01/14 - 06/30/18 (4 years 13 weeks)

PSC Mod#1 Amount: \$12,000,000 PSC Mod#1 Duration: 07/01/18-06/30/22 (4 years 1 day)

PSC Cumulative Amount Proposed: \$18,504,869 PSC Cumulative Duration Proposed: 8 years 13 weeks

1. Description of Work

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

~~Represent eligible clients who are uninsured, underinsured, or at risk of losing insurance to pursue or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage, thus providing them with improved access to healthcare and the financial means to stabilize their living situation. Legal assistance to client in moving disabled residents on to SSI and SSDI benefits by providing specialized SSI consultative and advocacy services and Human Immunodeficiency Virus (HIV) Health Services benefits counseling.~~

Contractor will utilize its legal staff to provide representation directly to clients to maximize client income in order to stabilize client living situations and provide client access to healthcare. The Department of Public Health (DPH) provides these advocacy services in administrative hearings and related legal processes in collaboration with the Human Services Agency (HSA) and other service providers, as these agencies are often serving the same clients, and among these partners, DPH Behavioral Health Services (BHS) contributes its clear experience and expertise in serving clients with behavioral health and HIV/AIDS diagnoses. Clients will be received primarily from referrals from HSA, DPH (civil service) mental health centers and/or providers serving People Living with HIV/AIDS (PLWHA) in San Francisco, and who are uninsured, underinsured, or at risk of losing insurance, in order to obtain or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage. Clients likely will include people who have multiple diagnoses, have been incarcerated, have documented substance use disorders, who are homeless, single parents, people of color, immigrants, women, and/or part of the Lesbian/Gay/ Bisexual/Transgender (LGBT) community, and may be monolingual or limited English-speaking, with fluency in a range of languages, including Spanish, Cantonese, Mandarin and Tagalog.

-

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

Clients eligible for SSI and other income assistance programs are more likely to become engaged in ongoing and preventive treatment, are more likely to have access to housing, and tend to better meet

From: Van Nostern, Julie (CAT)
To: Hale, Jacquie (DPH); ELIZONDO, VIRGINIA DARIO (CAT); SIMPSON, LOUISE (CAT)
Cc: Moreno, Mario C (DPH)
Subject: RE: Request to Confirm that the City Attorney's Office does not represent DPH clients in SSI/SSDI appeals
Date: Wednesday, September 19, 2018 3:32:57 PM

Jacquie,

✂ You are correct the City Attorney's Office represents the City and cannot represent DPH clients. In the future, direct this type of inquiry to me and I will determine who should handle the response.

Best, Julie

Confidential Attorney-Client Communications - Do Not Disclose/Confidential Attorney-Work Product - Do Not Disclose

The information contained in this electronic message may be confidential and may be subject to the attorney-client privilege and/or the attorney work product doctrine. It is intended only for the use of the individual or entity to whom it is addressed. If you are not the intended recipient, you are hereby notified that any use, dissemination or copying of this communication is strictly prohibited. If you have received this electronic message in error, please notify me by telephone at (415) 554-4277, and delete the original message from your e-mail system. Thank you.

Julie Van Nostern
Chief Attorney, Health and Human Services
Office of the City Attorney
Fox Plaza
1390 Market Street - 5th Floor
San Francisco, CA 94102-5408
Telephone: (415) 554-4277
Facsimile: (415) 557-6747
Email: julie.van.nostern@sfcityatty.org

From: Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>
Sent: Wednesday, September 19, 2018 2:25 PM
To: Van Nostern, Julie (CAT) <Julie.Van.Nostern@sfcityatty.org>; Elizondo, Virginia Dario (CAT) <Virginia.Dario.Elizondo@sfcityatty.org>; Simpson, Louise (CAT) <Louise.Simpson@sfcityatty.org>
Cc: Moreno, Mario C (DPH) <mario.c.moreno@sfdph.org>
Subject: Request to Confirm that the City Attorney's Office does not represent DPH clients in SSI/SSDI appeals
Importance: High

Hi. I'm not sure who can help me with this, so I'm sending this to the three of you, in hopes that you will be able to confirm that the City Attorney's Office does not represent DPH clients in benefits counseling appeals or hearings.

I'm in the process of submitting a modification to a PSC for these services—currently provided through a contract with Positive Resource Center (PRC)—and I anticipate that the Civil Service Commission will ask me if I have asked you about this, since they asked when we submitted our initial request to them in 2014 (which they approved with earlier assurances from your office, but they like up to date information).

PRC legal staff represent clients to help clients to get or stay on SSI/SSDI. Clients are either uninsured, underinsured or at risk of losing public or private health insurance who are referred by DPH and System Of Care providers, as well as HSA.

I'm attaching the PSC and the Scope Of Work for this program, for your reference. If you can just respond to this email with a brief email confirming that you do not do this work, I can then use this email as the documentation that I think will be required.

Thank you!

Jacquie Hale
Manager, Office of Contracts Management and Compliance, DPH Business Office
1380 Howard Street #421B / San Francisco, CA 94103 / Jacquie.Hale@SFDPH.org
(415) 255-3508

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Additional Attachment(s)



San Francisco Department of Public Health
Greg Wagner
Acting Director of Health

City and County of San Francisco
London Breed, Mayor

DATE: September 25, 2018

TO: Suzanne Choi, DHR PSC Coordinator

FROM: Jacquie Hale, Director, DPH Office of Contract Management and Compliance,
DPH Business Office

RE: PSC 48070-13/14 Assistance to Clients with Federal and
Other Income Assistance Programs

This is to request that the above Personal Services Contract (PSC) be calendared for the October 15, 2018, meeting of the Civil Service Commission. Below is a brief summary of our mutual efforts to meet, to date:

May 25: DPH notified SEIU
June 19: SEIU requested to meet regarding 6 PSCs, including 48070-13/14
July 10: DPH met with SEIU
[June 21-August 17: DPH met with SEIU regarding 10 PSCs, including 48070-13/14]
September 10-17: DPH re-wrote PSC Description of Services/Scope of Work
September 18: DPH sent revised Description of Services/Scope of Work to SEIU
September 24: DPH had not received any feedback from SEIU
September 25: DPH asked SEIU to provide feedback, noted would request calendaring

We have responded to SEIU's concerns and would like to be able to go ahead with the contract under this PSC, which provides services in support of getting clients—whom the Human Services Agency and DPH often both serve—onto federal Supplemental Security Income (SSI) or Supplemental Security Disability Insurance (SSDI)—which reduces costs to the General Fund and provides better services and more stability to clients.

Please let me know if you need further information.

Thank you.

cc: Mario Moreno, Deputy Director, DPH Business Office/
Director, Office of Contracts Management and Compliance

Union Information and Questions Meeting July 10, 2018
 Item: PSC 48070-13/14 Assistance to Clients with Federal and Other Income Assistance Programs

Present:

Name	Title	Organization
Xiu Min	Field Representative	SEIU Local 1021
Jessica Inouye	Organizer	SEIU Local 1021
Sara Hofverberg	Member	SEIU Local 1021
Edwin Batongbacal	Deputy Director, DPH Behavioral Health Services Adult and Older Adult Programs	SF Dept. of Public Health
Michelle Ruggels	Director, DPH Business Office	SF Dept. of Public Health
Jacque Hale	Manager, Ofc. of Contracts Mgt. & Compliance	SF Dept. of Public Health
Mahlet Girma	Senior Administrative Analyst, Office of Contracts Management & Compliance	SF Dept. of Public Health

Notes:

Q: Estimated # of clients serviced on a daily, weekly, monthly and annual basis?

A: The contract projects that there be 475 unduplicated clients served annually.

Q: What types of positions are housed by these contractors to work on this PSC? Please provide a list positions, job posting, salary and job descriptions.

A: Information on job posting, job descriptions and full salaries is not available. The positions funded in the contract for these services include: a Managing Legal Director, Supervising Attorneys, Staff Attorneys/Benefits Advocates; Legal Assistants; Quality Assurance Director; and Front Office Coordinator.

Q: How many FTEs per classification identified in this PSC work on these services?

A: Classifications are specified in the PSC form in order to answer the CSC question as to which classifications might perform the work if the work were brought in-house. They do not correspond to positions in the contract. The Department selects contractors, and contractors are responsible for determining positions for their own agencies.

Additional Note: In response to discussion with SEIU, DPH agreed to revise the Description of Services in the PSC. Those revisions are shown below.

(continued)

Description of Work

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

- Included in notification of SEIU:
-

Represent eligible clients who are uninsured, underinsured, or at risk of losing insurance to pursue or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage, thus providing them with improved access to healthcare and the financial means to stabilize their living situation. Legal assistance to client in moving disabled residents on to SSI and SSDI benefits by providing specialized SSI consultative and advocacy services and Human Immunodeficiency Virus (HIV) Health Services benefits counseling.

- Revised:
-

Contractor will utilize its legal staff to provide representation directly to clients to maximize client income in order to stabilize client living situations and provide client access to healthcare. The Department of Public Health (DPH) provides these advocacy services in administrative hearings and related legal processes in collaboration with the Human Services Agency (HSA) and other service providers, as these agencies are often serving the same clients, and among these partners, DPH Behavioral Health Services (BHS) contributes its clear experience and expertise in serving clients with behavioral health and HIV/AIDS diagnoses. Clients will be received primarily from referrals from HSA, DPH (civil service) mental health centers and/or providers serving People Living with HIV/AIDS (PLWHA) in San Francisco, and who are uninsured, underinsured, or at risk of losing insurance, in order to obtain or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants (SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage. Clients likely will include people who have multiple diagnoses, have been incarcerated, have documented substance use disorders, who are homeless, single parents, people of color, immigrants, women, and/or part of the Lesbian/Gay/ Bisexual/Transgender (LGBT) community, and may be monolingual or limited English-speaking, with fluency in a range of languages, including Spanish, Cantonese, Mandarin and Tagalog.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPHDept. Code: DPHType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Assistance to Clients with Federal and Other Income Assistance ProgramsFunding Source: Work OrderPSC Amount: \$6,504,869PSC Est. Start Date: 04/01/2014 PSC Est. End Date 06/30/2018**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Represent eligible clients who are uninsured, underinsured, or at risk of losing insurance to pursue or maintain Supplemental Security Income/Supplemental Disability Income/Cash Assistance for Immigrants(SSI/SSDI/CAPI) income and corresponding Medi-Cal/Medicare coverage, thus providing them with improved access to healthcare and the financial means to stabilize their living situation. Legal assistance to client in moving disabled residents on to SSI and SSDI benefits by providing specialized SSI consultative and advocacy services and Human Immunodeficiency Virus (HIV) Health Services benefits counseling.

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

Clients eligible for SSI and other income assistance programs are more likely to become engaged in ongoing and preventive treatment, are more likely to have access to housing, and tend to better meet their nutritional needs. Denial of those services will result in an increase in disease, poor nutrition, homelessness, and crime.

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

These services were previously included under PSC 4151-09/10.

D. Will the contract(s) be renewed?

Yes, if funding is available.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.
not applicable**2. Reason(s) for the Request****A. Indicate all that apply (be specific and attach any relevant supporting documents):**

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

B. Explain the qualifying circumstances:

Not Applicable

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Demonstrated legal expertise in Social Security Administration disability criteria, evidentiary rules and application process; demonstrated experience in providing legal representation for clients through the legal appeal and hearing stages.

- B. Which, if any, civil service class(es) normally perform(s) this work? 2903, Eligibility Worker; 2905, Senior Eligibility Worker; 2907, Eligibility Worker Supervisor;
- 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?

No civil service classes normally perform this work. The above Eligibility Worker series contains the nearest possible classes that perform services related to this work. This program is administered in collaboration with the Department of Human Services, to provide maximum resources related to mutual clients and to maximize revenues to the City.

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 current civil service classes established to provide these services, which are provided only to clients with behavioral and other illnesses (not to employees or departments).
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, as the services are as-needed and intermittent, depending on individual clients' needs.

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.
- 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. Contractor: Positive Resource Center

**7. Union Notification: On 01/18/2014, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous**

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

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

Address: 101 Grove Street, Room 307 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48070 - 13/14

DHR Analysis/Recommendation:

action date: 03/02/2015

Commission Approval Required

continued - 03/02/2015

04/21/2014 DHR Approved for 04/21/2014