



Edwin M. Lee  
Mayor

Micki Callahan  
Human Resources Director

Date: July 15, 2016

To: The Honorable Civil Service Commission

Through: Micki Callahan  
Human Resources Director *Micki Callahan*

From: Nataliya Kuzina, REG  
Shamica Jackson/Stacey Lo, PUC  
Brett Conner, CHF  
Cynthia Hamada, MTA  
Joyce Kimotsuki, CON  
Stacey Camillo, DPW  
Jacquie Hale, DPH

Subject: **Personal Services Contracts Approval Request**

This report contains nine (9) 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 FY2016-2017	Total for FY2016-2017
\$47,125,758	\$386,470,026	\$849,865,784

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**POSTING FOR****August 01, 2016****PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR****Commission Hearing Date**

2016-08-01

**APPLY**

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
22911 - 15/16	ELECTIONS	\$2,289,758.00	The Contractor assigns a project manager who maintains year-round contact with Department personnel. The project manager is responsible for organizing the Contractor's resources according to the terms of the contract. Among the contractual requirements, the Contractor is responsible for formatting the ballots before each election for both the optical scan and the touch screen equipment, assisting with the testing of the voting equipment, the processing of vote-by-mail ballots, and providing technical support for equipment associated with the voting equipment by providing personnel to join an Election Day phone bank, and, to stage more than 30 technicians in the field on Election Day. The project manager also organizes third-party vendors to assist in conducting elections for such activities as the delivery to and retrieval from polling places all of the voting equipment, materials, and supplies.	December 11, 2016	December 11, 2018	ANNUAL
43386 - 15/16	PUBLIC UTILITIES COMMISSION	\$16,000,000.00	The scope of this progressive design-build is to bring in a qualified design-build team that includes designer and contractor to complete detailed design and construction for Phase 1 of the Bay Corridor Transmission and Distribution (BCTD) Project. The BCTD allows San Francisco Public Utilities Commission (SFPUC) to deliver electrical power to identified future customers along the southeast San Francisco waterfront including Candlestick Park development, new Warriors Arena and Southeast wastewater treatment plant. The BCTD project elements include high voltage electrical transformer stations, underground electrical duct banks and cables. The cost breakdown is \$3M for all professional services and \$13M is for construction.	August 1, 2016	April 1, 2018	REGULAR
44754 - 15/16	CHILDREN; YOUTH & THEIR FAMILIES	\$1,250,000.00	The Department of Children, Youth and Their Families wishes to provide its staff with content-specific training in subjects that directly address the community it serves, as well as the needs of the nonprofit organizations it supports. Some examples of training subjects currently under consideration are racial equity and results-based accountability. The department will regularly assess staff training needs throughout the course of our finding cycle and when deemed necessary will bring in content area experts to work with staff. General professional development opportunities in subjects currently offered by the Department of Human Resources will not be considered under this request; the department will continue to utilize the City's services in these circumstances.	July 1, 2016	June 30, 2021	REGULAR

**TOTAL AMOUNT \$19,539,758****8/11/16**

Published on *Personal Services Request Database* (<http://apps.sfgov.org/dhrdrupal>)

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**Posting For August 01, 2016****Proposed Modifications to Personal Services Contracts**

Commission Hearing Date

2016-08-01

APPLY

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
3012-13/14 - MODIFICATIONS	August 1, 2016	MUNICIPAL TRANSPORTATION AGENCY -- MTA	\$7,500,000	\$11,549,000	The San Francisco Municipal Transportation Agency (SFMTA) requires street teams to provide outreach, information and public relations services and serve as the SFMTA's "ambassadors" to the general public at sports events, street fairs, parades, and other public events. The teams would also provide services during crises such as transit agency shutdowns, direct the SFMTA's customers to current or re-routed transit connections, and provide other transit information as needed in multiple languages.	08/01/2016	07/31/2023	REGULAR
3037 12/13 - MODIFICATIONS	August 1, 2016	CONTROLLER -- CON	\$200,000	\$245,000	Provide technical writing, editing, and reporting services for the Controller's Payroll and Personnel Services Division for payroll system user guides, technical manuals, information bulletins, and other technical documents.	01/01/2018	12/31/2019	REGULAR
4041-13/14 - MODIFICATIONS	August 1, 2016	GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW	\$1,200,000	\$1,600,000	Provide specialized services in Specifications Writing and Hardware Design to support Department of Public Works (DPW) design staff on an as-needed basis. The Consultants will provide expert advice and services to ensure that the most up to date products are utilized in our specifications. The City intends to award two (2) contracts for \$200,000 each.	01/01/2019	12/31/2022	REGULAR
4123 12/13 - MODIFICATIONS	August 1, 2016	PUBLIC HEALTH -- DPH	\$1,586,000	\$3,494,700	Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.	10/01/2016	09/30/2019	REGULAR
4167 - 09/10 - MODIFICATIONS	August 1, 2016	PUBLIC HEALTH -- DPH	\$17,000,000	\$23,433,719	The proposed professional services will provide software programming and implementation support to DPH IT staff for application systems included in the Siemens Medical Services Invision products. The Invision system is the foundation of Patient Registration, Scheduling, Billing and Clinical records for DPH patient care services in Acute Care, Primary Care and Long Term Care. These systems require enhancement	07/01/2010	06/30/2020	REGULAR

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
					<p>and functional expansion periodically due to evolving program needs. It is also anticipated that additional service needs will arise to complete systems requirements for State and Federal patient care reimbursement regulations and direct patient care clinical services. The requested support services will also provide in-depth technical and system training for DPH information technology, clinical and administrative staff for on-going support and utilization of these systems. In addition, the Contractor will also provide Web-based remote data processing capabilities for healthcare data exchange required to link all provider sites and provide integrated clinical, demographic, and financial information across the Community Health Network system of the Department of Public Health. This applies only to the estimated professional services portion of the agreement.</p> <p><b>Scope Change:</b> This modification adds capacity necessary to professional services to allow the Department to begin the transition to a new Electronic Health Record while maintaining the existing Invision application, the current legacy application which supports clinical (lifetime clinical record), and financial operations (\$500 million in billable revenue).</p>			
40829 - 15/16 - MODIFICATIONS	August 1, 2016	PUBLIC HEALTH -- DPH	\$100,000	\$199,000	<p>The contractor will provide access to a fully hosted internet application that is used to maintain facility operations support; integrate, analyze and manage facility resources and personnel; assist with achieving compliance and tracking regulatory standards.</p>	06/01/2021	09/01/2023	REGULAR

**TOTAL AMOUNT \$27,586,000**

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ELECTIONS -- REG

Dept. Code: REG

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

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

Type of Service: Professional Services Related To Voting System Support

Funding Source: General Fund

PSC Amount: \$2,289,758

PSC Est. Start Date: 12/11/2016 PSC Est. End Date 12/11/2018

1. Description of Work

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

The Contractor assigns a project manager who maintains year-round contact with Department personnel. The project manager is responsible for organizing the Contractor's resources according to the terms of the contract. Among the contractual requirements, the Contractor is responsible for formatting the ballots before each election for both the optical scan and the touch screen equipment, assisting with the testing of the voting equipment, the processing of vote-by-mail ballots, and providing technical support for equipment associated with the voting equipment by providing personnel to join an Election Day phone bank, and, to stage more than 30 technicians in the field on Election Day. The project manager also organizes third-party vendors to assist in conducting elections for such activities as the delivery to and retrieval from polling places all of the voting equipment, materials, and supplies.

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

The service is necessary to continue the use of the voting system. Denial of the service would extinguish the City's ability to utilize the voting system since departmental personnel lack the expertise to fully prepare, test, operate, and maintain the voting system and its equipment. Currently, the Department cannot obtain another voting system to replace the current system; only the current system is approved by the California Secretary of State's Office to conduct ranked-choice elections.

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.

In 2005, the Department of Elections issued a Request of Proposal (RFP) for a new voting system and associated services for a total term of up to six years. In 2007, based on a competitive RFP process, the Board of Supervisors approved a not-to-exceed \$12,650,233 agreement between the Department of Elections and Sequoia Voting Systems, Inc. (now Dominion Voting Systems, Inc.) for a new voting system and related voting services from December 11, 2007 to December 10, 2011, with two one-year options to extend the agreement. On January 18, 2008, the Board of Supervisors approved a first amendment for an additional \$1,130,000; a settlement with the City's previous voting system vendor nullified a rebate from Dominion for the equipment associated with the previous vendor. On December 1, 2011, the Board of Supervisors approved a second amendment to exercise the two one-year options to extend the term through December 10, 2013 for an additional \$2,264,800, or a total not to exceed \$16,045,033. On September 23, 2013, the City amended the term of the agreement in its entirety to read as follows: Term of the Agreement. The term of this Agreement shall be nine (9) years, from December 11, 2007 to December 10, 2016.



D. Will the contract(s) be renewed?

If the City moves to another voting system from the current system, the City most likely will take one of two courses. The first is for the City to develop its own voting system based on open sources software. The second course would be to issue a Request for Proposals if another voting system becomes available and is able to conduct ranked-choice voting elections, and following is approved by the California Secretary of State's Office. However, if the development of the open source system does not occur in a timely manner or if no other system is approved that can conduct ranked-choice elections there is a possibility that the Department may need to extend this contract.

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

N/A

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

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

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

B. Explain the qualifying circumstances:

Advanced knowledge of preventative maintenance, system configuration using criteria based on specific election data, system testing, ballot layout, and troubleshooting of the software and hardware components of the Dominion Voting System are required. Knowledge of Voting System Use procedures for California. The Department has not sought to obtain a similar system or support services within the City since the voting system is proprietary to the vendor and using the system for, at most, two elections in a calendar year has not facilitated dedicating personnel to become sufficiently expert in the system's operation to undertake the Contractor's responsibilities.

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

A. Specify required skills and/or expertise: Advanced knowledge of preventative maintenance, system configuration using criteria based on specific election data, system testing, ballot layout, and troubleshooting of the software and hardware components of the Dominion Voting System are required. Knowledge of Voting System Use procedures for California.

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

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

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

The Department has not sought to obtain a similar system or support services within the City since the voting system is proprietary to the vendor and using the system for, at most, two elections in a calendar year has not facilitated dedicating personnel to become sufficiently expert in the system's operation to undertake the Contractor's responsibilities.

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

A. Explain why civil service classes are not applicable.

As stated above, the Department has not sought to obtain a similar system or support services within the City since the voting system is proprietary to the vendor and using the system for, at most, two elections in a calendar year has not facilitated dedicating personnel to become sufficiently expert in the system's operation to undertake the Contractor's responsibilities.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The highly specialized nature of the work performed and the frequency of use (once or twice a year) would make adopting a class for this work impractical.

**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. Dominion will provide low-level training for operating the system in the following areas: Logic & Accuracy Testing, Polling Place use of voting equipment, and troubleshooting and repair of voting equipment. The level of training will occur based on whether personnel have had previous experience with the system or are new to using the system, and whether they are permanent civil service, assigned to the Department's Information Technology Division, Polling Place Operations, or Election Day Support Division.

- 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.

BOS aprvd orig agreement & 3 amendments

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

In 2005, the Department of Elections issued a Request of Proposal (RFP) for a new voting system and associated services for a total term of up to six years. In 2007, based on a competitive RFP process, the Board of Supervisors approved a not-to-exceed \$12,650,233 agreement between the Department of Elections and Sequoia Voting Systems, Inc. (now Dominion Voting Systems, Inc.) for a new voting system and related voting services from December 11, 2007 to December 10, 2011, with two one-year options to extend the agreement. On January 18, 2008, the Board of Supervisors approved a first amendment for an additional \$1,130,000; a settlement with the City's previous voting system vendor nullified a rebate from Dominion for the equipment associated with the previous vendor. On December 1, 2011, the Board of Supervisors approved a second amendment to exercise the two one-year options to extend the term through December 10, 2013 for an additional \$2,264,800, or a total not to exceed \$16,045,033. On September 23, 2013, the City amended the term of the agreement in its entirety to read as follows: Term of the Agreement. The term of this Agreement shall be nine (9) years, from December 11, 2007 to December 10, 2016.

- 7. Union Notification:** On 04/22/2016, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

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

Name: Nataliya Kuzina Phone: 415-554-5683 Email: nataliya.kuzina@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Pl., Rm 48 San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 22911 - 15/16

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

## **Burgos, Sandro (REG)**

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**From:** Kuzina, Nataliya  
**Sent:** Friday, April 22, 2016 1:43 PM  
**To:** Burgos, Sandro (REG)  
**Subject:** FW: Receipt of Notice for new PCS over \$100K PSC # 22911 - 15/16

—Original Message—

From: dhr-psccordinator@sfgov.org [mailto:dhr-psccordinator@sfgov.org] On Behalf Of nataliya.kuzina@sfgov.org  
Sent: Friday, April 22, 2016 1:41 PM  
To: Kuzina, Nataliya; amakayan@ifpte21.org; jb@local16.org; Lopez-Barrios, Ricardo (PDR); Basconcello, Katherine (PUC); Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; Carey.dall@seiu1021.org; richardisen@gmail.com; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; joe.brenner@seiu1021.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA) (DSS); smcgarry@nccrc.org; rmitcheil@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; Larry.Bradshaw@seiu1021.org; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; camaguey@sfmea.com; ecdemvoter@aol.com; tiya.thlang@seiu1021.org; Kuzina, Nataliya; Isen, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)  
Subject: Receipt of Notice for new PCS over \$100K PSC # 22911 - 15/16

RECEIPT for Union Notification for PSC 22911 - 15/16 more than \$100k

The ELECTIONS -- REG has submitted a request for a Personal Services Contract (PSC) 22911 - 15/16 for \$2,289,758 for Initial Request services for the period 12/11/2016 -- 12/11/2018. 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/6757> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again, change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**

PSC 22911-15/16

Resolution #654-07

FILE NO. 070040

RESOLUTION NO.

654-07

1 [Department of Elections contract for new voting system.]

2  
3 **Resolution approving the award and execution of a \$12.65 million four-year contract by**  
4 **the City and County of San Francisco, through its Department of Elections, to Sequoia**  
5 **Voting Systems, Inc., for the purchase of a new voting system and provision of**  
6 **associated voting services.**

7  
8 WHEREAS, On March 31, 2005, the Department of Elections issued a Request for  
9 Proposals seeking bids for a new voting system, including voting equipment and services, to  
10 collect, count, tabulate and report votes for all elections held in the City and County of San  
11 Francisco; and,

12 WHEREAS, Sequoia Voting Systems, Inc. ("Sequoia"), was the top-ranked bidder in  
13 the competitive process, and on September 30, 2005 the Department of Elections issued a  
14 letter of intent to negotiate a contract with Sequoia; and,

15 WHEREAS, On December 1, 2006, the Department of Elections completed  
16 negotiations and reached agreement with Sequoia, on the terms of a proposed contract (the  
17 "Agreement"), in the amount of \$12,650,233.25, with a term of four years from December 11,  
18 2007 through December 11, 2011 with the option for the City to renew two times for one (1)  
19 year each renewal, which contract is on file with the Clerk of the Board of Supervisors in File  
20 No. 070040 and is hereby declared to be a part of this resolution as if set forth fully herein; and,

21 WHEREAS, To encourage timely certification of the voting system by the November  
22 2008 election, including certification for ranked-choice voting (RCV), the Agreement  
23 acknowledges that Sequoia has submitted a complete application for Federal certification,  
24 including use of the voting system for RCV elections, on August 22, 2007; requires Sequoia to  
25 pay certain specified liquidated damages to the City if Sequoia does not submit an application



1 for State certification within five business days of receipt of Federal certification; and requires  
2 Sequoia to pay liquidated damages if Sequoia fails to achieve certification of the voting  
3 system for use in the November 2008 election due to the failure of Sequoia to pursue and  
4 application for certification with reasonable care and diligence; and,

5 WHEREAS, To encourage voter confidence in the use of the Sequoia voting system in  
6 RCV elections, the Agreement requires Sequoia to publicly and fully demonstrate the  
7 capability of its voting equipment to record ballots cast in RCV elections by February 12,  
8 2008. If Sequoia fails to comply with this requirement, the Agreement allows the City to  
9 withhold the \$650,000 payment to Sequoia for the RCV application until such demonstration  
10 has been conducted; and,

11 WHEREAS, To ensure that the voting system is fully operational by the February 2008  
12 election, the Agreement requires Sequoia to pay certain specified liquidated damages to the  
13 City if it has not completed acceptance testing of system hardware and software within ten  
14 days after delivery of equipment to the City, but no later than January 15, 2008, and to pay  
15 certain specified liquidated damages to the City if logic and accuracy testing is not completed  
16 ten days prior to the election; and,

17 WHEREAS, To help avoid breakdowns of voting equipment on election day, the  
18 Agreement requires that Sequoia pay certain specified liquidated damages to the City if 10%  
19 or more of the touch screen machines fail to operate on election day, or if 10% or more of the  
20 optical scan machines fail to operate on election day, provided that if a touch screen machine  
21 is repaired, replaced or made operational within one hour or an optical scan is repaired,  
22 replaced, or made operational within four hours, the machine will not be deemed to have  
23 failed to operate for these purposes; and,

1           WHEREAS, To assist the City in properly recording and tabulating all votes, the  
2 Agreement requires Sequoia to provide a contingency plan demonstrating how Sequoia will  
3 conduct a manual count if the voting system is not certified by election day, to pay for all costs  
4 associated with conducting the manual count, and to pay certain specified liquidated damages  
5 if there is an error, defect or malfunction in the voting system and Sequoia fails to provide an  
6 alternative tabulation solution that processes a statement of votes in compliance with  
7 applicable laws; and,

8           WHEREAS, To encourage a transparent, secure and fair election, the Agreement  
9 requires Sequoia to comply with any California law or any regulation or rule promulgated by  
10 the Secretary of State requiring voting system vendors in the state of California to provide  
11 disclosed or open source code, and if the California Secretary of State certifies any voting  
12 system for use in California that is licensed under a disclosed or open source code license,  
13 the Agreement further requires Sequoia to disclose its source code or submit an application  
14 for federal certification of a disclosed or open source code voting system within one year; and,

15           WHEREAS, To encourage a transparent, secure and fair election, the Agreement  
16 further requires the City to retain a third-party expert to review Sequoia's source code to  
17 assess whether the source code contains material security deficiencies or malicious code  
18 designed to interfere with the operation of the voting machines; release the expert report to  
19 the public; and, if the expert report discloses any material security deficiencies in the source  
20 code or any malicious code which would affect the operation of the voting machines, the  
21 Agreement requires Sequoia to take corrective action. If the problem cannot be resolved by  
22 the next election, due to Sequoia's inability to receive approval from the Federal and State  
23 certification agencies to make a change to the source code, the Agreement requires Sequoia  
24  
25

1 to provide an alternative plan for properly tabulating and recording all votes, such as a manual  
2 count, and to pay for all costs associated with this alternative; and,

3 WHEREAS, To ensure timely reporting of election results, the Agreement requires  
4 Sequoia to pay certain specified liquidated damages to the City if due to an error, defect or  
5 malfunction in the voting system, the City's tabulation of votes during an election at 10% or  
6 more of the precincts is delayed beyond 11:59 p.m. on election night, which liquidated  
7 damages increase under a specified schedule for each half-day beyond election day that the  
8 delay continues; and,

9 WHEREAS, The Agreement limits Sequoia's total liability for liquidated damages  
10 related to the voting system in the following amounts: in the first year, Four Million Dollars  
11 (\$4,000,000), but not exceeding Three Million Dollars (\$3,000,000) for any single election; in  
12 the second year, Three Million Dollars (\$3,000,000), but not exceeding Two Million Five  
13 Hundred Thousand Dollars (\$2,500,000) for any single election; for the remaining term of the  
14 Agreement, Two Million Dollars (\$2,000,000) for any single election that includes ranked-  
15 choice voting and One Million Dollars (\$1,000,000) for any single election that does not  
16 include ranked-choice voting; and as further provided in the Agreement; and,

17 WHEREAS, The foregoing limitation on liability does not restrict the indemnification  
18 obligations of Sequoia under the Agreement, which include the obligation to indemnify the City  
19 against: any judicial action or informal claim brought against the City based on an allegation  
20 that the City's use of the voting system's software or hardware infringes a patent, copyright, or  
21 intellectual property right of a third party; any liability, costs and expenses actually incurred by  
22 the City as a result of opposing disclosure of the Trade Secrets contained in Sequoia's  
23 firmware, software, pricing, products, finances and business; any and all loss, costs, damage,  
24  
25

1 injury, liability, and claims resulting from injury to or death of a person arising from Sequoia's  
2 performance of the Agreement; and as further provided in the Agreement; and,

3 WHEREAS, Such limitation on liability also does not restrict Sequoia's liability to the  
4 City arising out of or in connection with any violation of the City's Charter or Ordinances or the  
5 liability of Sequoia to the City for causes of action arising independently of the Agreement,  
6 including, without limitation, fraud, misrepresentation or intentional tortious misconduct; and  
7 as further provided in the Agreement; and,

8 WHEREAS, The City has available to use for the purchase of new voting equipment  
9 \$5,500,000 in Help America Vote Act (HAVA) and Proposition 41 funds; now, therefore, be it

10 RESOLVED, That in accordance with Charter section 9.118(b), the Board of  
11 Supervisors hereby approves a contract with Sequoia Voting Systems, Inc. for a new voting  
12 system for the City and County of San Francisco on the terms and conditions of the  
13 Agreement on file with the Clerk of the Board of Supervisors in File No. \_\_\_\_ ; and, be it

14 FURTHER RESOLVED, That the Board authorizes the Director of Elections to execute,  
15 on behalf of the City, the Agreement and enter into any modification of the Agreement that the  
16 Director determines, in consultation with the City Attorney, are in the best interests of City, do  
17 not increase the cost of the contract, are necessary and advisable to effectuate the purpose of  
18 the contract or this Resolution, and are in compliance with all applicable laws, including the  
19 City's Charter and applicable City Ordinances.

20 RECOMMENDED:

21   
22 \_\_\_\_\_  
23 JOHN ARNTZ  
24 Department Head

FUNDS AVAILABLE:

25   
\_\_\_\_\_

EDWARD HARRINGTON  
Controller



City and County of San Francisco

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

Tails  
Resolution

File Number: 070040

Date Passed: September 11, 2007

Resolution approving the award and execution of a \$12.65 million four-year contract by the City and County of San Francisco, through its Department of Elections, to Sequoia Voting Systems, Inc., for the purchase of a new voting system and provision of associated voting services.

December 11, 2007 Board of Supervisors — ADOPTED

Ayes: 9 - Alioto-Pier, Chu, Dufty, Elsbernd, Maxwell, McGoldrick, Mirkarimi,  
Peskin, Sandoval

Noes: 2 - Ammiano, Daly

File No. 070040

I hereby certify that the foregoing Resolution was ADOPTED on December 11, 2007 by the Board of Supervisors of the City and County of San Francisco.



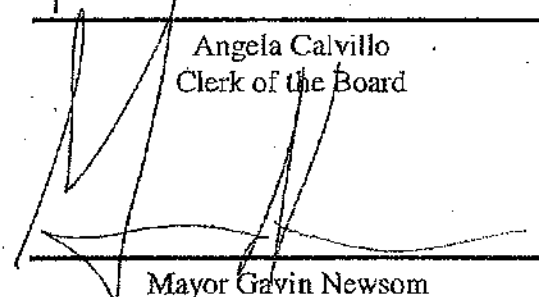
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Angela Calvillo  
Clerk of the Board

12.12.07

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Date Approved



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Mayor Gavin Newsom

PSC 22911-15/16

Resolution #65-08

1 [Department of Elections Amendment to Current Voting Systems Contract with Sequoia  
2 Voting Systems, Inc.]

3  
4 **Resolution approving an amendment to the existing contract between the City and**  
5 **County of San Francisco, through its Department of Elections, and Sequoia Voting**  
6 **Systems, Inc., to pay Sequoia \$1,130,000 rather than transfer to Sequoia the City's**  
7 **AutoMARK ballot marking devices, in connection with a settlement of litigation by the**  
8 **City against Elections System & Software involving those devices.**

9  
10 WHEREAS, In 2006, the City purchased AutoMARK ballot marking devices for use by  
11 voters with disabilities for \$3,495,027 plus taxes from Elections System & Software ("ES&S");  
12 and,

13 WHEREAS, In December 2007 the City entered into a four-year \$12,650,233 contract  
14 with Sequoia Voting Systems, Inc. ("Sequoia") for the purchase of new voting equipment and  
15 voting services (the "Sequoia Contract"), as approved by the Board of Supervisors under  
16 Resolution No. 654-07; and,

17 WHEREAS, As part of the Sequoia Contract, the City agreed to transfer ownership of  
18 the City's 563 AutoMARK ballot marking devices to Sequoia in return for a reduction of  
19 \$1,130,000 from the price of the contract otherwise payable by the City to Sequoia; and,

20 WHEREAS, On November 20, 2007, the City sued ES&S over, among other claims,  
21 the failure of ES&S to provide certified AutoMARK machines in the 2006 sale of the  
22 AutoMARK machines to the City; and,

23 WHEREAS, The City and ES&S have reached a settlement agreement, which the  
24 Board of Supervisors approved by Ordinance No. 18-08 (the "ES&S Settlement  
25 Agreement"); and,



1           WHEREAS, Under the ES&S Settlement Agreement, the City has agreed to transfer  
2 the AutoMARK machines to ES&S and ES&S has agreed to pay the City \$3,500,000, less  
3 \$421,034.75 owed by the City to ES&S for services rendered under previously unpaid  
4 invoices, for a net sum of \$3,078,965.25; and,

5           WHEREAS, To allow the City to enter into the ES&S Settlement Agreement, Sequoia is  
6 willing to accept payment representing the previously agreed-upon value of the AutoMARKs  
7 instead of taking title to the AutoMARKs from the City as otherwise provided in the Sequoia  
8 Contract; and,

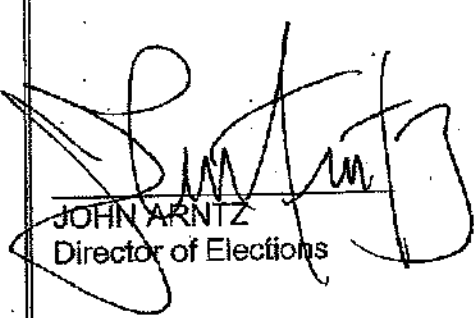
9           WHEREAS, The City will pay Sequoia \$1,130,000 from a portion of the settlement  
10 payment to the City by ES&S, and the Board of Supervisors has approved an appropriation of  
11 such amount for such purpose under Ordinance No. 18-08; now,  
12 therefore, be it

13           RESOLVED, That in accordance with Charter section 9.118(b), the Board of  
14 Supervisors hereby approves an amendment to the Sequoia Contract, a copy of which  
15 amendment is on file with the Clerk of the Board in File No. 080124 and is incorporated in this  
16 resolution by reference, to pay Sequoia \$1,130,000 instead of transferring the City's  
17 AutoMARK machines to Sequoia; and, be it

18           FURTHER RESOLVED, That the Board authorizes the Director of Elections to execute,  
19 on behalf of the City, this amendment to the Sequoia Contract and enter into any  
20 modifications of the Sequoia Contract that the Director determines in consultation with the City  
21 Attorney, are in the best interests of City, do not increase the cost to the City of the Sequoia  
22 Contract, are necessary and advisable to effectuate the purpose of the Sequoia Contract or  
23 this Resolution, and are in compliance with all applicable laws, including the City's Charter  
24 and applicable City Ordinances.

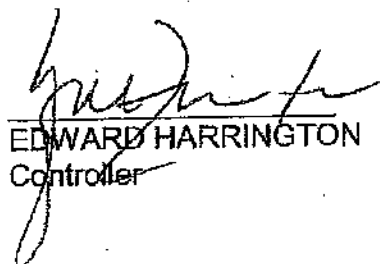
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RECOMMENDED:



Handwritten signature of John Arntz, written in black ink, overlapping the printed name and title.

JOHN ARNTZ  
Director of Elections



Handwritten signature of Edward Harrington, written in black ink, overlapping the printed name and title.

EDWARD HARRINGTON  
Controller



City and County of San Francisco

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

Tails

Resolution

File Number: 080124

Date Passed:

Resolution approving an amendment to the existing contract between the City and County of San Francisco, through its Department of Elections, and Sequoia Voting Systems, Inc., to pay Sequoia \$1,130,000 rather than transfer to Sequoia the City's AutoMARK ballot marking devices, in connection with a settlement of litigation by the City against Elections System & Software involving those devices.

February 5, 2008 Board of Supervisors — CONTINUED

Ayes: 11 - Alioto-Pier, Ammiano, Chu, Daly, Dufty, Elsbernd, Maxwell,  
McGoldrick, Mirkarimi, Peskin, Sandoval

February 12, 2008 Board of Supervisors — ADOPTED

Ayes: 9 - Alioto-Pier, Chu, Dufty, Elsbernd, Maxwell, McGoldrick, Mirkarimi,  
Peskin, Sandoval

Noes: 2 - Ammiano, Daly

File No. 080124

I hereby certify that the foregoing Resolution was ADOPTED on February 12, 2008 by the Board of Supervisors of the City and County of San Francisco.



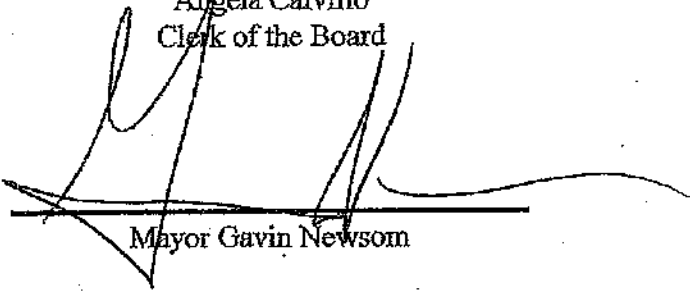
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Angela Calvillo  
Clerk of the Board

2-12-08

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Date Approved



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Mayor Gavin Newsom

PSC 22911-15/16

Resolution #494-11

1 [Contract Extension – Voting System – Not to Exceed \$2,264,800]

2  
3 Resolution approving an amendment to the existing contract between the City and  
4 County of San Francisco, through its Department of Elections, and Dominion Voting  
5 Systems for an amount not to exceed \$2,264,800 and to extend the term of the contract  
6 through December 10<sup>1</sup>/<sub>A</sub>, 2013. *4/15/12*

7  
8 WHEREAS, In December 2007 the City entered into a contract with Sequoia Voting  
9 Systems, Inc. (Sequoia) for the purchase of new voting equipment and voting services  
10 (Contract), as approved by the Board of Supervisors under Resolution No. 654-07; and

11 WHEREAS, The term of the Contract is four years, from December 11, 2007 to  
12 December 11, 2011, with two options for the City to renew for one year each; and

13 WHEREAS, The total cost of the original Contract was \$12.65 million, of which \$8.46  
14 million was payment for voting equipment and \$4.18 million was payment for voting services;  
15 and

16 WHEREAS, The City used \$5.8 million in Help America Vote Act (HAVA) and  
17 Proposition 41 funds to purchase the new voting equipment; and

18 WHEREAS, In January 2008, the City and Sequoia amended the contract to state that  
19 the City would pay Sequoia \$1.13 million instead of transferring the City's old voting machines  
20 to Sequoia, as approved by the Board of Supervisors under Resolution No. 65-08; and

21 WHEREAS, Dominion Voting Systems, Inc., acquired substantially all of the assets of  
22 Sequoia on June 4, 2010, and assumed Sequoia's contract with the City; and

23 WHEREAS, City desires to exercise its two one-year options to extend the Contract  
24 through December 11, 2013, at a cost not-to-exceed \$2,264,800; and

1           WHEREAS, Under these extensions, Dominion would continue to provide voting  
2 services at the rates in effect for 2007-2011 and City would not be required to purchase new  
3 voting machines; now, therefore, be it

4           RESOLVED, That in accordance with Charter Section 9.118(b), the Board of  
5 Supervisors hereby approves an amendment to the Contract, a copy of which amendment is  
6 on file with the Clerk of the Board in File No. 111153 and is incorporated in this resolution  
7 by reference, to extend the Contract through December 11, 2013; and, be it

8           FURTHER RESOLVED, That the Board authorizes the Director of Elections to execute,  
9 on behalf of the City, this amendment to the Dominion Contract and enter into any  
10 modifications of the Dominion Contract that the Director determines in consultation with the  
11 City Attorney, are in the best interests of City, are necessary and advisable to effectuate the  
12 purpose of the Contract or this Resolution, and are in compliance with all applicable laws,  
13 including the City's Charter and applicable City Ordinances.

14  
15 RECOMMENDED:

16  
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18  
19 JOHN ARNTZ  
Director of Elections

20  
21  
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23  
24  
25  
BEN ROSENFELD  
Controller



City and County of San Francisco

Tails  
Resolution

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

File Number: 111153

Date Passed: November 22, 2011

Resolution approving an amendment to the existing contract between the City and County of San Francisco, through its Department of Elections, and Dominion Voting Systems for an amount not to exceed \$2,264,800 and to extend the term of the contract through December 10, 2013.

November 16, 2011 Budget and Finance Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING NEW TITLE

November 16, 2011 Budget and Finance Committee - RECOMMENDED AS AMENDED

November 22, 2011 Board of Supervisors - ADOPTED

Ayes: 11 - Avalos, Campos, Chiu, Chu, Cohen, Elsbernd, Farrell, Kim, Mar, Mirkarimi and Wiener

File No. 111153

I hereby certify that the foregoing Resolution was ADOPTED on 11/22/2011 by the Board of Supervisors of the City and County of San Francisco.

Angela Calvillo  
Clerk of the Board

  
Mayor Edwin Lee  
Date Approved



PSC 22911-15/16

Ordinance #269-13

1 [Contract Amendment - Voting System - Not to Exceed \$19,690,933.25]

2  
3 **Ordinance authorizing the Department of Elections to enter into the third amendment of**  
4 **an agreement with Dominion Voting Systems, Inc., to commence following Board**  
5 **approval, to extend the term of the agreement through December 10, 2016, increasing**  
6 **the total not-to-exceed amount of the agreement by \$3,645,900 from \$16,045,033.25 to**  
7 **\$19,690,933.25.**

8  
9 **NOTE:** **Unchanged Code text and uncodified text** are in plain Arial font.  
10 **Additions to Codes** are in *single-underline italics Times New Roman font*.  
11 **Deletions to Codes** are in *strikethrough italics Times New Roman font*.  
12 **Board amendment additions** are in double-underlined Arial font.  
13 **Board amendment deletions** are in ~~strikethrough Arial font~~.  
14 **Asterisks (\* \* \* \*)** indicate the omission of unchanged Code  
15 subsections or parts of tables.

16  
17 Be it ordained by the People of the City and County of San Francisco:

18 **Section 1. Findings.** The Board of Supervisors of the City and County of San  
19 Francisco hereby finds that:

20 (a) In March 31, 2005, the Department of Elections issued a Request for Proposal  
21 (RFP) for new voting equipment and voting equipment services. The RFP, pursuant to San  
22 Francisco Administrative Code 21.9(a)(2), stated the contract would be for an initial term of  
23 four years, with two options to renew for one year each. Sequoia Voting Systems, Inc.  
24 (Sequoia) was the highest ranked proposer.

25 (b) In December 2007 the City entered into a contract with Sequoia for the purchase  
of new voting equipment and voting services (Agreement), as approved by the Board of  
Supervisors under Resolution No. 654-07. As set out in the RFP, the initial term of the  
Agreement was four years, from December 11, 2007, to December 11, 2011, with two options

1 for the City to renew for one year each. Dominion Voting Systems, Inc. (Dominion) acquired  
2 substantially all of the assets of Sequoia on June 4, 2010, and assumed Sequoia's Agreement  
3 with the City.

4 (c) In November 2011, the City exercised its two one-year options and extended the  
5 Contract through December 11, 2013, at a cost not-to-exceed \$3,645,900, as approved by the  
6 Board of Supervisors under Resolution No. 494-11. Under these extensions, Dominion  
7 continued to provide voting services at the rates in effect for 2007-2011 and City was not  
8 required to purchase new voting machines.

9 (d) The Department of Elections now desires to extend the Agreement through  
10 December 10, 2016, at a cost not-to-exceed of \$3,645,900 for the Third Amendment. Under  
11 this extension, Dominion would continue to provide voting services at the rates in effect for  
12 2007-2011, and City would not be required to purchase new voting machines.

13 (e) This extension is necessary for five reasons. First, the last time the Department  
14 of Elections issued an RFP for a new voting system, the RFP process took over two and a  
15 half years to complete given the complicated nature of the purchase. Second, the  
16 Department of Elections does not anticipate having additional funds to secure new voting  
17 equipment in the current fiscal year, and thus will continue to use the current system. Third,  
18 there are no new voting systems currently available that have been certified by the Secretary  
19 of State and can accommodate elections using Ranked Choice Voting. Fourth, only one  
20 contractor offers Ranked Choice Voting options, which is the City's current contractor,  
21 Dominion. Finally, the existing six-year Agreement is unusually short and unique to San  
22 Francisco for a voting system.

23 **Section 2. Approval of Third Amendment**  
24  
25

1 (a) The Third Amendment to the Agreement is on file with the Clerk of the Board in  
2 File No. 130797, substantially in final form, with all material terms and conditions included,  
3 and only remains to be executed by the parties upon approval of this Ordinance. The Board  
4 of Supervisors hereby approves the Third Amendment to the Agreement in substantially the  
5 form contained in File No. 130797.

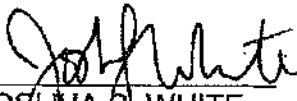
6 (b) The Board of Supervisors authorizes the Department of Elections to enter into  
7 any modifications that, prior to final execution of the amendment by all parties, the  
8 Department of Elections determines, in consultation with the City Attorney, are in the best  
9 interest of the City, do not otherwise materially increase the obligations or liabilities of the City,  
10 are necessary or advisable to effectuate the purposes of the Agreement, and are in  
11 compliance with all applicable laws, including City's Charter.

12 (c) In approving this Third Amendment, the Board of Supervisors finds that it is  
13 reasonable and in the public interest to waive, and does hereby waive, the requirement of  
14 Administrative Code Section 21.9 that all City contracts for commodities and/or services be  
15 limited to the initial terms and period of extensions included in the solicitation.

16 (d) Within 30 days of the parties executing the Third Amendment to the Agreement,  
17 the Department of Elections shall submit to the Clerk of the Board of Supervisors a completely  
18 executed copy for inclusion in File No. 130797. This requirement and obligation resides with  
19 the Department of Elections, and is for purposes of having a complete file only, and in no  
20 manner affects the validity of the approved Third Amendment to the Agreement.

21 **Section 3. Effective Date.** This ordinance shall become effective immediately upon  
22 enactment. Enactment occurs when the Mayor signs the ordinance, the Mayor returns the  
23 ordinance unsigned or does not sign the ordinance within ten days of receiving it, or the Board  
24 of Supervisors overrides the Mayor's veto of the ordinance.

1 APPROVED AS TO FORM:  
2 DENNIS J. HERRERA, City Attorney

3  
4 By:   
5 JOSHUA S. WHITE  
6 Deputy City Attorney

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City and County of San Francisco

Tails  
Ordinance

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

File Number: 130797

Date Passed: November 26, 2013

Ordinance authorizing the Department of Elections to enter into the third amendment of an agreement with Dominion Voting Systems, Inc., to commence following Board approval, to extend the term of the agreement through December 10, 2016, increasing the total not-to-exceed amount of the agreement by \$3,645,900 from \$16,045,033.25 to \$19,690,933.25.

November 13, 2013 Budget and Finance Committee - RECOMMENDED

November 19, 2013 Board of Supervisors - PASSED, ON FIRST READING

Ayes: 11 - Avalos, Breed, Campos, Chiu, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee.

November 26, 2013 Board of Supervisors - FINALLY PASSED

Ayes: 11 - Avalos, Breed, Campos, Chiu, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

File No. 130797

I hereby certify that the foregoing Ordinance was FINALLY PASSED on 11/26/2013 by the Board of Supervisors of the City and County of San Francisco.

Angela Calvillo  
Clerk of the Board

  
\_\_\_\_\_  
Mayor

Date Approved

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION – PUC

Dept. Code: PUC

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

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

Type of Service: Bay Corridor Transmission & Distribution Phase I Progressive Design-Build (DB-128)

Funding Source: SFPUC Power Operating Budget

PSC Duration: 1 year 34 weeks

PSC Amount: \$16,000,000

**1. Description of Work**

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

The scope of this progressive design-build is to bring in a qualified design-build team that includes designer and contractor to complete detailed design and construction for Phase 1 of the Bay Corridor Transmission and Distribution (BCTD) Project. The BCTD allows San Francisco Public Utilities Commission (SFPUC) to deliver electrical power to identified future customers along the southeast San Francisco waterfront including Candlestick Park development, new Warriors Arena and Southeast wastewater treatment plant. The BCTD project elements include high voltage electrical transformer stations, underground electrical duct banks and cables. The cost breakdown is \$3M for all professional services and \$13M is for construction.

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

Progressive design build service is critical to accelerate project delivery to meet customer power delivery schedule. BCTD Phase 1 customers require a large amount of power (40 megawatts) by December 2017. Denial of this Progressive design-build delivery method will risk a power service delay to customers.

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

Similar design-build services have been provided in the past for projects that have an accelerated delivery schedule with specialized and complex engineering and construction services. The most recent project approved by the Civil Service Commission on January 4, 2016 is the Warnerville Substation Rehabilitation Design-Build Services PSC No. 42155-15/16 (DB-127). The scope of services is different but the project delivery method is the same.

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

Assuming the project schedule and scope remains unchanged, there is no plan to renew Phase 1 contract at this time.

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

A design-build RFP requires designer and contractor to have specific proven design and construction experiences in transmission and distribution. Furthermore, no civil service classes have the technical capability to perform this construction work.

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

A. Specify required skills and/or expertise: Proven experiences and expertise are needed in the areas of: 1) electrical system design that includes substations and electrical conductor; 2) construction in electrical substation and conducts; 3) seismic, geotechnical and structural engineering; 4) cost estimating; 5) design-build/progressive design-build alternative delivery methods; 6) development of bid plans and specifications; 7) project and construction scheduling in San Francisco; 8) permitting.

B. Which, if any, civil service class(es) normally perform(s) this work? 1314, Public Relations Officer; 5201, Junior Engineer; 5203, Asst Engr; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review; 5408, Coord of Citizen Involvement;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: SFPUC will procure or place order(s) for transformer station equipment and instrumentation for Contractor to install and commission. Contractor will purchase all remaining transformer station appurtenances and materials for the project to complete installation.

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

The San Francisco Public Utilities Commission (SFPUC) staff can perform most of the Civil and Electrical engineering for this project except for some of the high voltage/transmission specialty electrical work. Because of staffing commitments to other projects and the restrictive timeline of this project, SFPUC staff are unable to commit resources to complete the design work in house. The SFPUC is committed to meeting and working with the Union on discussions regarding work load forecasting, staffing plans, staff development and hiring, and professional services contracting requests.

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

A. Explain why civil service classes are not applicable.

A Design-build Request For Proposal (RFP) requires designer and contractor to have specific proven design and construction experiences in transmission and distribution. Furthermore, no civil service classes have the technical capability to perform this construction work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The design and construction service for transmission and distribution is unique and seldom. Continuous need for this is not necessary.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not. No. Training is not apart of this PSC. The design and construction service for transmission and distribution is unique and seldom. Continuous need beyond this contract is not necessary.



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

No.

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

No.

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

No.

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

No.

7. **Union Notification:** On 05/13/2016, the Department notified the following employee organizations of this PSC/RFP request:

Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 43386 - 15/16

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [Slackson@sfgwater.org](mailto:Slackson@sfgwater.org)  
**To:** [Jackson\\_Shamica; amakayan@ifpte21.org; richardisen@gmail.com; L21PSCReview@ifpte21.org; Sanchez, Daniel; Isen, Richard; DHR-PSCCoordinator\\_DHR](mailto:Jackson_Shamica; amakayan@ifpte21.org; richardisen@gmail.com; L21PSCReview@ifpte21.org; Sanchez, Daniel; Isen, Richard; DHR-PSCCoordinator_DHR)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 43386 - 15/16  
**Date:** Friday, May 13, 2016 2:46:25 PM

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RECEIPT for Union Notification for PSC 43386 - 15/16 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 43386 - 15/16 for \$83,000,000 for Initial Request services for the period 08/01/2016 - 04/01/2018. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/6818> 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)**

Similar PSC

Warnerville Substation Rehabilitation

Design-Build Services

(DB-127)

PSC No. 42155 - 15/16

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION – PUC

Dept. Code: PUC

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

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

Type of Service: Warnerville Substation Rehabilitation Design-Build Services (DB-127)

Funding Source: Hetch Hetchy 10-Yr Capital Plan

PSC Duration: 1 year 43 weeks

PSC Amount: \$30,000,000

**1. Description of Work**

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

The proposed work consist of designing and building the Warnerville Substation Rehabilitation project entailing replacement of the transformers, circuit breakers, disconnect switches, relays, fencing and grounding. In the Design-Build (DB) method, the Contractor will be responsible for design and construction.

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

This service is needed to meet California Independent System Operators (CAISO) requirements to increase the capacity of the Warnerville substation to mitigate overloads that can affect the City's ability to provide reliable electric service to its customers, and to increase the system reliability with the replacement of aging equipment. If the contract is denied, critical improvements to the City's power system may be out of regulatory compliance and suffer operations failure.

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

Engineers in civil service classes 5207, 5241 and 5211 perform routine engineering work. However, the scope of this project requires engineers with specialized experience in design and rehabilitation of high voltage substations.

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 scope of this project requires engineers with specialized experience in design and rehabilitation of high voltage substations.

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

A. Specify required skills and/or expertise: Expertise required includes design and construction of high voltage electrical substations. The designers shall have 15 years of experience on high voltage substations.

B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer;

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

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

This is the first substation rehabilitation project to include replacement of transformers. The specialized experience needed to perform this work is not available with 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 do not have the in-depth knowledge and specialized expertise to provide the design and professional support services for projects that involve high voltage substation. The City does not routinely perform this type of project. This work happens about every 30 to 40 years.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. Design and construction of high voltage substations is specialized.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
None. Design and construction of high voltage substations is specialized.

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

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

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

If so, please explain and include a copy of the board or commission action.

No.

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

No.

7. **Union Notification:** On 11/09/2015, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs. Local 21, Prof & Tech Eng. Local 21, Architect & Engineers, Local 21, Professional & Tech Engrs, Local 21, Prof & Tech Eng. Local 21, Architect & Engineers, Local 21.

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42155 - 15/16

DHR Analysis/Recommendation:

action date: 01/04/2016

Commission Approval Required

Approved by Civil Service Commission

01/04/2016 DHR Approved for 01/04/2016



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CHILDREN; YOUTH & THEIR FAMILIES – CHF

Dept. Code: CHF

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

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

Type of Service: Content-Specific Department Staff Training

Funding Source: Children and Youth Fund

PSC Amount: \$1,250,000

PSC Est. Start Date: 07/01/2016

PSC Est. End Date: 06/30/2021

**1. Description of Work**

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

The Department of Children, Youth and Their Families wishes to provide its staff with content-specific training in subjects that directly address the community it serves, as well as the needs of the nonprofit organizations it supports. Some examples of training subjects currently under consideration are racial equity and results-based accountability. The department will regularly assess staff training needs throughout the course of our finding cycle and when deemed necessary will bring in content area experts to work with staff. General professional development opportunities in subjects currently offered by the Department of Human Resources will not be considered under this request; the department will continue to utilize the City's services in these circumstances.

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

In order to address the complex and dynamic practice of youth development, the Department of Children, Youth and Their Families is required to maintain a high degree of staff knowledge and training in areas specific to the field. Our interest is in providing our staff with continuous learning opportunities in subjects that directly affect their work. Without this training, our department will not be able to provide the nonprofits we support -- which serve historically under-served communities -- with the highest possible degree of service and oversight.

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

See attachment

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

See attachment

**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 this work to be ongoing, and will renew this PSC every five years.

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

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

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

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

**B. Explain the qualifying circumstances:**

These services will be for short-term engagements with department staff, and required on a periodic basis as deemed necessary by department leadership.

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

- A. Specify required skills and/or expertise: Representative areas of expertise for which the department may seek assistance include content-specific program practices, racial equity, results-based accountability, nonprofit grantmaking, technical training, and executive coaching.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer; 1237, Training Coordinator; 9706, Employment & Training Spec 5; 9708, Employment & Training Spec 6;
- 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 City does not currently offer staff trainings in the specific areas sought by this PSC.

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

- A. Explain why civil service classes are not applicable.  
The City does not currently offer staff trainings in the specific areas sought by this PSC, nor is it feasible to develop this expertise.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Due to the specificity of the expertise, and limited scope of any individual assignment, it is not feasible to adopt a new civil service class for this work.

**6. Additional Information**

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

**7. Union Notification: On 05/03/2016, the Department notified the following employee organizations of this PSC/RFP request:**

Municipal Executive Association; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous

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

Name: Brett Conner Phone: 415.554.8427 Email: brett.conner@dcyf.org

Address: 1390 Market Street, Suite 900 San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44754 - 15/16

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

**Choi, Suzanne (HRD)**

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**From:** dhr-psccordinator@sfgov.org on behalf of brett.conner@dcyf.org  
**Sent:** Tuesday, May 03, 2016 1:17 PM  
**To:** Conner, Brett (CHF); Lopez-Barrios, Ricardo (PDR); Basconillo, Katherine (PUC);  
pcamarillo\_seiu@sbcglobal.net; Wendy.Frigiliana@seiu1021.org;  
pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com;  
ablood@cirseiu.org; xiumin.li@seiu1021.org; Poon, Sin Yee (HSA) (DSS);  
david.canham@seiu1021.org; jtanner940@aol.com; L21PSCReview@ifpte21.org;  
carnaguey@sfmea.com; staff@sfmea.com; Conner, Brett (CHF); Isen, Richard (TIS); DHR-  
PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PCS # 44754 - 15/16

RECEIPT for Union Notification for PSC 44754 - 15/16 more than \$100k

The-CHILDREN; YOUTH & THEIR FAMILIES -- CHF has submitted a request for a Personal Services Contract (PSC) 44754 - 15/16 for \$1,250,000 for Initial Request services for the period 07/01/2016 – 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/6756> 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

**Conner, Brett (CHF)**

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**From:** Ben Sizemore <Ben.Sizemore@seiu1021.org>  
**Sent:** Friday, July 08, 2016 2:08 PM  
**To:** Conner, Brett (CHF)  
**Cc:** Morales, Lina (CHF); XiuMin Li  
**Subject:** Update re: PSC #44754 15/16

**Importance:** High

Hello Brett,

Thank you for meeting with myself and Lina regarding PSC #44754 15/16. You were able to address our questions and concerns on the topic adequately. The Union has no reservations regarding this particular PSC moving forward.

Sincerely,

Ben Sizemore  
Field Representative

SEIU Local 1021  
350 Rhode Island  
Suite 100 South  
San Francisco, CA 94103  
office 415-848-3645  
cell 415-717-7928  
fax 415-431-6241

bs cwa9404/aff-clo

## **Additional Attachment(s)**



**Maria Su, Psy.D.**  
EXECUTIVE DIRECTOR



**Edwin M. Lee**  
MAYOR

**Attachment to PSC #43024-15/16  
Content-Specific Department Staff Training**

**1C. 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.**

In the past staff trainings have been arranged one of two ways. The first is internally, with staff members acting as thought leaders and sharing their knowledge with their department colleagues. The other way we have trained staff is through contracts we have in place for technical assistance service providers under PSC 4041 12-13. The department feels that these efforts should be focused on our grantees, and that staff support should now fall under its own PSC.

**1D. Will the contract(s) be renewed?**

Depending on the training subject and the areas of expertise of our vendors, some contracts are expected to be one-time only while others will be extended.

**5B. Will the contractor train City and County employee?**

This contract is specifically for the training of department employees of the following classifications: 0962, 0952, 0923, 0922, 9775, 9774, 9772, 1824, 1823, 1822, 1840, 1450, and 1408. The number of hours will vary from year to year based on department need.

**Department of Children, Youth and Their Families**  
1390 Market Street Suite 900 \* San Francisco, CA 94102 \* 415-554-8990 \* [www.dcyf.org](http://www.dcyf.org)



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CHILDREN; YOUTH & THEIR FAMILIES Dept. Code: CHF

Type of Request: [ ] Initial [x] Modification of an existing PSC (PSC # 4041 12/13)

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

Type of Service: Evaluation and Technical Assistance for city funded programs serving children and youth

Funding Source: Children's Fund

PSC Original Approved Amount: \$4,000,000

PSC Original Approved Duration: 11/01/12 - 06/30/16 (3 years 34 w

PSC Mod#1 Amount: \$3,000,000

PSC Mod#1 Duration: 07/01/16-06/30/18 (2 years)

PSC Mod#2 Amount:

PSC Mod#2 Duration:

PSC Cumulative Amount Proposed: \$7,000,000

PSC Cumulative Duration Proposed: 5 years 34 weeks

1. Description of Work

A. Scope of Work:

This request is for professional evaluation and technical assistance for DCYF grant-funded programs providing services to children, youth and their families. Evaluation services will measure the quality of services provided and the effectiveness of programs with respect to the department's strategic goals. As needed, technical assistance will be provided to address issues of program quality. Contractors conducting evaluation may differ from contractors providing technical assistance.

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

DCYF administers over four hundred grants to nonprofit agencies to provide services to children and youth. Grants are funded in a 3-year funding cycle with Children's Fund dollars. The Children's Service Allocation Plan is mandated by the Children's Amendment. Evaluation services are a requirement of the plan. Item J in the Children's Amendment states:

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC. This service was approved in the original PSC 4041 12/13

D. Will the contract(s) be renewed? No. Request is for the funding cycle ending June 30, 2016.

2. Union Notification: On 10/23/15, the Department notified the following employee organizations of this PSC/RFP request: SEIU Local 1021; Management & Superv Local 21;

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4041 12/13

DHR Analysis/Recommendation:

02/01/2016

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 02/01/2016

02/01/2016

July 2013

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Evaluation: Ability to develop an evaluation plan; knowledge of qualitative & quantitative research methods; ability to collect data & work with large disparate data sets; knowledge of IRB process & laws protecting confidentiality, ability to analyze & interpret data & make recommendations to improve program quality & increase the impact of evaluation investment. Technical assistance: Expertise in nonprofit management, including fiscal practices & governance; ability to provide one on one coaching & group trainings

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

1823,1824,9772,9774,

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:

DCYF uses 9772s & 9774s to monitor grants, but the skill set required for the program officer position is not the same skills used by an evaluator. In addition, the close monitoring relationship between grantees & DCYF staff introduces the potential for bias into an evaluation & could bring into question the integrity of the evaluation.

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

No, evaluations of the magnitude required by the Children's Amendment should be conducted by an independent body.

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

YES NO

- A. Will the contractor directly supervise City and County employee?  YES  NO
- B. Will the contractor train City and County employee?  
How to conduct observations. Hours will vary based on need.  YES  NO
- C. Are there legal mandates requiring the use of contractual services?  YES  NO
- D. Are there federal or state grant requirements regarding the use of contractual services?  YES  NO
- E. Has a board or commission determined that contracting is the most effective way to provide this service?  YES  NO
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? Existing contracts will likely be extended for two years  YES  NO

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 10/23/15 BY:

Name: Deedra Jackson Phone: 415-554-9329 Email: deedra@dcyf.org

Address: 1390 Market Street, Suite 900 San Francisco, CA 94102

**Modification**  
**Personal Services Contracts**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request:  Initial  Modification of an existing PSC (PSC # 3012-13/14)

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

Type of Service: Street Team Outreach and Information Services

Funding Source: General Funds

PSC Original Approved Amount: \$49,000

PSC Original Approved Duration: 08/01/13 - 09/30/13 (8 weeks 4 days)

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

PSC Mod#1 Duration: 10/01/13-10/31/18 (5 years 4 weeks)

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

PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$7,500,000

PSC Mod#3 Duration: 08/01/16-07/31/23 (4 years 39 weeks)

PSC Cumulative Amount Proposed: \$11,549,000 PSC Cumulative Duration Proposed: 10 years 1 day

**1. Description of Work**

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

The San Francisco Municipal Transportation Agency (SFMTA) requires street teams to provide outreach, information and public relations services and serve as the SFMTA's "ambassadors" to the general public at sports events, street fairs, parades, and other public events. The teams would also provide services during crises such as transit agency shutdowns, direct the SFMTA's customers to current or re-routed transit connections, and provide other transit information as needed in multiple languages.

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

These services are essential to assist actual or potential SFMTA customers to the extent possible by providing information regarding the SFMTA's transit connections as well as other transit agencies. The consequence of denial will result in a void of outreach, education and assistance to the public at times of peak need for information on transportation services.

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

Yes.

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

Yes.

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

This is an ongoing service for intermittent, as-needed public information "Ambassadors" for the

those in need of assistance with the public transportation system during sports events, street fairs, parades, concerts, general events and emergencies.

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

A. Display all that apply

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

Explain the qualifying circumstances:

The street teams provide outreach, information and public relations services and serve as the SFMTA's "ambassadors" to the general public at sports events, street fairs, parades, and other public events. The teams would also provide services during crises such as transit agency shutdowns, direct the SFMTA's customers to current or re-routed transit connections, and provide other transit information as needed in multiple languages. Therefore, these necessary services are provided on an intermittent/as-needed basis.

B. Reason for the request for modification:

Additional cost and extension of duration.

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

A. Specify required skills and/or expertise: Contractor must have the following skills: five years' experience providing transportation information/outreach at public events; three years' experience and extensive knowledge of San Francisco streets and neighborhoods, Muni schedules, Clipper (transit pass) system; spoken language capabilities in English, Spanish, Cantonese/Mandarin, Vietnamese, Russian, Korean and Tagalog; and a working knowledge of all Bay Area transit systems and Civil Rights Act Title VI requirements.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Current civil services classes do not perform this type of work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. Given the intermittent, as-needed nature of these outreach and information services, it would not be practical to adopt a new civil service class to perform this work.

**6. Additional Information**

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

7. **Union Notification:** On 05/06/16, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

Name: Cynthia Hamada Phone: 415.701.5381 Email: cynthia.hamada@sfmta.com

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 3012-13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

## Hamada, Cynthia

---

**From:** dhr-psccordinator@sfgov.org on behalf of cynthia.hamada@sfrmta.com  
**Sent:** Friday, May 06, 2016 11:32 AM  
**To:** Hamada, Cynthia; amakayan@ifpte21.org; jb@local16.org; Lopez, Ricardo; Basconillo, Katherine A; Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; richardisen@gmail.com; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlianga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; hodlocal@pacbell.net; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgary@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jdujitz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; mshelley@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; L21PSCReview@ifpte21.org; LiUNA.local261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; camaguey@sfmea.com; eccdemvoter@aol.com; Hamada, Cynthia; DHR-PSCCoordinator, DHR; Isen, Richard  
**Subject:** Receipt of Modification Request to PSC # 3012-13/14 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The MUNICIPAL TRANSPORTATION AGENCY – MTA has submitted a modification request for a Personal Services Contract (PSC) for \$7,500,000 for services for the period August 1, 2016 – July 31, 2023. 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/600>

Email sent to the following addresses: L21PSCReview@ifpte21.org



## **Additional Attachment(s)**

**Choi, Suzanne (HRD)**

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**From:** Hamada, Cynthia <Cynthia.Hamada@sfmta.com>  
**Sent:** Friday, July 15, 2016 9:56 AM  
**To:** Choi, Suzanne (HRD)  
**Subject:** FW: Receipt of Modification Request to PSC # 3012-13/14 - MODIFICATIONS

Suzanne,

Thank you for your call. I reached out both by telephone and email to XiuMin Li (who wrote the original questions to us) and Hector Cardenas, but have received no response on PSC #3012-13/14 Mod 3. I have received a response from both of them on another PSC since. Therefore, the SFMTA appreciates that PSC #3012-13/14 Mod 3 is calendared for the CSC on 8/1/16.

**Cynthia Hamada**  
Sr. Personnel Analyst, ELR, SFMTA  
415.701.5381

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**From:** Hamada, Cynthia  
**Sent:** Tuesday, July 12, 2016 5:55 PM  
**To:** 'XiuMin Li' <XiuMin.Li@seiu1021.org>  
**Cc:** 'Hector Cardenas' <Hector.Cardenas@seiu1021.org>; Desedas, Deanna J <Deanna.Desedas@sfmta.com>  
**Subject:** RE: Receipt of Modification Request to PSC # 3012-13/14 - MODIFICATIONS

Dear XiuMin,

I left you a voicemail yesterday regarding this personal services contract and whether or not you would still like to meet over it. I believe that you are able to resolve your problem the online system. As I mentioned I was also having a problem with it at that time. Please advise.

Thank you,

**Cynthia Hamada**  
Sr. Personnel Analyst, ELR, SFMTA  
415.701.5381

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY Dept. Code: MTA

Type of Request: [ ] Initial [x] Modification of an existing PSC (PSC # 3012-13/14)

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

Type of Service: Street Team Outreach and Information Services

Funding Source: General Funds
PSC Original Approved Amount: \$49,000 PSC Original Approved Duration: 08/01/13 - 09/30/13 (8 weeks 4 da
PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 10/01/13-10/31/18 (5 years 4 weeks)
PSC Mod#2 Amount: \$3,000,000 PSC Mod#2 Duration: no duration added
PSC Cumulative Amount Proposed: \$4,049,000 PSC Cumulative Duration Proposed: 5 years 13 weeks

1. Description of Work

A. Scope of Work:

The San Francisco Municipal Transportation Agency (SFMTA) requires street teams to provide outreach, information and public relations services and serve as the SFMTA's "ambassadors" to the general public at sports events, street fairs, parades, and other public events. The teams would also provide services during crises such as transit agency shutdowns, direct the SFMTA's customers to current or re-routed transit connections, and provide other transit information as needed in multiple languages.

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

These services are essential to assist actual or potential SFMTA customers to the extent possible by providing information regarding the SFMTA's transit connections as well as other transit agencies. The consequence of denial will result in a void of outreach, education and assistance to the public at times of peak need for information on transportation services.

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.
Yes. PSC #3012-13/14.

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

2. Union Notification: On 09/09/15, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3012-13/14
DHR Analysis/Recommendation: 10/19/2015
Commission Approval Required Approved by Civil Service Commission with cond
DHR Approved for 10/19/2015 10/19/2015

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

A. Specify required skills and/or expertise:

Contractor must have the following skills: five years' experience providing transportation information/outreach at public events; three years' experience and extensive knowledge of San Francisco streets and neighborhoods, Muni schedules, Clipper (transit pass) system; spoken language capabilities in English, Spanish, Cantonese/Mandarin, Vietnamese, Russian, Korean and Tagalog; and a working knowledge of all Bay Area transit systems and Civil Rights Act Title VI requirements.

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

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

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

A. Explain why civil service classes are not applicable:

Current civil services classes do not perform this type of work.

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

No. Given the intermittent, as-needed nature of these outreach and information services, it would not be practical to adopt a new civil service class to perform this work.

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

	<u>YES</u>	<u>NO</u>
A. Will the contractor directly supervise City and County employee?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B. Will the contractor train City and County employee? Training is not included in this PSC. The street team member must be available.	<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? Caribou Public Relations	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

ON 09/09/15 BY:

Name: \_\_\_\_\_ Phone: 415.701.5381 Email: cynthia.hamada@sfmta.com

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CONTROLLER

Dept. Code: CON

Type of Request:  Initial  Modification of an existing PSC (PSC # 3037 12/13)

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

Type of Service: Technical Writing, Editing, and Reporting Services

Funding Source: Department General Fund

PSC Original Approved Amount: \$45,000

PSC Original Approved Duration: 01/01/13 - 12/31/15 (2 years 52 weeks)

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 01/01/16-12/31/17 (2 years 1 day)

PSC Mod#2 Amount: \$200,000

PSC Mod#2 Duration: 01/01/18-12/31/19 (2 years)

PSC Cumulative Amount Proposed: \$245,000

PSC Cumulative Duration Proposed: 7 years

**1. Description of Work**

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

Provide technical writing, editing, and reporting services for the Controller's Payroll and Personnel Services Division for payroll system user guides, technical manuals, information bulletins, and other technical documents.

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

The ability to communicate technical information effectively, particularly regarding payroll-related issues, is critical to the operations of the City and the Controller's Office. The Controller's Office is required to provide a large amount of data and information to decision-makers, employees, vendors, citizens, and other governmental agencies. Services will enable the Controller's Office to ensure clear, accurate interpretation, comprehension, and implementation of complex, technical procedures and legal requirements under tight time constraints.

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

yes

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

Will the contract(s) be renewed: It is possible, subject to City's continued satisfaction with services and contractor performance. If so, it would be through a new Request For Quotes, Request For Proposals, or Request For Qualifications.

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

PSC modification to extend to cover over 5 years is needed due to the new financial system

implementation starting July 1, 2017 that will replace existing policies and procedures at different phases after the July 1, 2017 Go Live date.

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

A. Display all that apply

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

Explain the qualifying circumstances:

Services are short-term, intermittent, highly specialized, and independent in nature.

B. Reason for the request for modification:

Modification of amount and term needed to address significant policies and procedure changes due to new financial system, new legislation, and other updates needing technical writing, editing, electronic publication and other services. Increased amount for PSC modification of \$200,000 and term extension to 12/31/2019 which is total duration of 6 years.

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

A. Specify required skills and/or expertise: Contractor is required to have expertise in technical writing services, working with and writing about highly complex and technical payroll procedures, policies, legislation, and payroll system operations.

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

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

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

See Attachment

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

A. Explain why civil service classes are not applicable.

The IS Business Analyst positions listed above include technical writing in their job descriptions, but do not specifically include complex payroll policy and procedure services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. These services are short term, intermittent, highly specialized, and independent in 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 contract? If so, please explain what that will entail; if not, explain why not.  
No training. Not appropriate to train employees. Short-term, intermittent, highly specialized, and independent in nature.
- 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.  
Lux will continue work

7. **Union Notification:** On 06/20/16, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

Name: Joyce Kimotsuki Phone: (415) 554-6562 Email: joyce.kimotsuki@sfgov.org

Address: City Hall, Rm 306, 1 Dr. Carlton B. Goodlett Place, San Francisco, CA 94102

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3037 12/13

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)



**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [jovce.kimotsuki@sfgov.org](mailto:jovce.kimotsuki@sfgov.org)  
**To:** [Kimotsuki.Joyce@CON](mailto:Kimotsuki.Joyce@CON); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [jb@local16.org](mailto:jb@local16.org); [Lopez-Samios.Ricardo@PDR](mailto:Lopez-Samios.Ricardo@PDR); [Basconillo.Katherine@PUC](mailto:Basconillo.Katherine@PUC); [Sandeep.lal@seiu1021.org](mailto:Sandeep.lal@seiu1021.org); [pcamarillo\\_seiu@sbcolocal.net](mailto:pcamarillo_seiu@sbcolocal.net); [Wendv.Fripliana@seiu1021.org](mailto:Wendv.Fripliana@seiu1021.org); [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org); [agonzalez@lam1414.org](mailto:agonzalez@lam1414.org); [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [leah.berlanga@seiu1021.org](mailto:leah.berlanga@seiu1021.org); [gail@sfdlocal798.org](mailto:gail@sfdlocal798.org); [cityworker@sfcwu.org](mailto:cityworker@sfcwu.org); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); [djohnson@opcmiatocal300.org](mailto:djohnson@opcmiatocal300.org); [hodlocal@nacbells.net](mailto:hodlocal@nacbells.net); [ablood@cirseiu.org](mailto:ablood@cirseiu.org); [pkarinen@nccrc.org](mailto:pkarinen@nccrc.org); [tony@dc16.us](mailto:tony@dc16.us); [stevak@bac3-ca.org](mailto:stevak@bac3-ca.org); [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org); [Poon.Sin.Yee@HSA](mailto:Poon.Sin.Yee@HSA) (DSS); [smccravy@nccrc.org](mailto:smccravy@nccrc.org); [mitchell@twust.org](mailto:mitchell@twust.org); [proip@local39.org](mailto:proip@local39.org); [jduritz@uapd.com](mailto:jduritz@uapd.com); [staff@simea.com](mailto:staff@simea.com); [mike@dc16.us](mailto:mike@dc16.us); [khughes@ibew6.org](mailto:khughes@ibew6.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [sfmsa@gmail.com](mailto:sfmsa@gmail.com); [mshelley@dc16.us](mailto:mshelley@dc16.us); [david.carham@seiu1021.org](mailto:david.carham@seiu1021.org); [franner940@aol.com](mailto:franner940@aol.com); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [LIUNA.local261@gmail.com](mailto:LIUNA.local261@gmail.com); [local200twu@sbcolocal.net](mailto:local200twu@sbcolocal.net); [speedv4854@aol.com](mailto:speedv4854@aol.com); [camaguey@simea.com](mailto:camaguey@simea.com) (contact); [ecdemvoter@aol.com](mailto:ecdemvoter@aol.com); [Kimotsuki.Joyce@CON](mailto:Kimotsuki.Joyce@CON); [DHR-PSCCoordinator.DHR@HRD](mailto:DHR-PSCCoordinator.DHR@HRD)  
**Subject:** Receipt of Modification Request to PSC # 3037 12/13 - MODIFICATIONS  
**Date:** Monday, June 20, 2016 4:43:48 PM

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PSC RECEIPT of Modification notification sent to Unions and DHR

The CONTROLLER -- CON has submitted a modification request for a Personal Services Contract (PSC) for \$200,000 for services for the period January 1, 2018

– December 31, 2019. 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/5591>

Email sent to the following addresses: [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org)  
[amakayan@ifpte21.org](mailto:amakayan@ifpte21.org)

# Additional Attachment(s)

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

No civil service class normally performs this work, as it includes specialized skills and expertise in complex personnel and payroll processes. The closest civil service classes appear to be 1052 – IS Business Analyst, 1053 – IS Business Analyst-Senior and 1054 – IS Business Analyst-Principal, which include general technical writing knowledge that would not be sufficient to perform the description of work listed above.

REQUEST FOR QUOTES



City and County of San Francisco  
Office of the Controller

**REQUEST FOR QUALIFICATIONS FOR  
EDITING, TECHNICAL WRITING AND ELECTRONIC PUBLICATION SERVICES  
RFQ#CON2015-18**

**CONTACT: Joyce Kimotsuki, CentralContracts@sfgov.org, 415-554-6562**

**Background**

The City and County of San Francisco (City) seeks responses from firms demonstrating successful experience in providing services in the following areas:

1. Editing Services (Audit Report Editing, Management Report, Editing and Analysis Report Editing);
2. Technical Writing Services;
3. Other Writing Services (staff style guides and templates for reports and memoranda, public-facing newsletters and website content); and
4. Multimedia Electronic Publication.

These services will be used to assist City departments with improving the quality, presentation and clarity of their reports and documentation. Distribution or access to these documents may include City employees including payroll officers, accountants, system users, other employees, vendors, and other governmental agencies, and the public. Respondents must have experience providing editing and technical writing services to government clients. Experience with government audit and analysis report editing is highly desirable.

**Intent of this RFQ**

It is the intent of the Controller's Office to create a pre-qualified list of consultant firms from which interested City departments, boards or commissions may choose prospective contractors on an as-needed basis for services.

**Anticipated Contract Budget**

The anticipated contract budget range for each contract resulting from this RFQ is estimated to be between \$5,000 and \$100,000 per year depending upon each project's needs and at the City's sole, absolute discretion.

**Anticipated Contract Term**

Respondents pre-qualified under this RFQ will remain eligible for consideration for consideration and contract negotiation on an as-needed basis for two years from the pre-qualification notification date. The anticipated contract term for contracts resulting from this RFQ may last up to two (2) years, with the option to extend the contract for up to three (3) additional years. Actual contract term may vary depending upon project needs at the City's sole, absolute discretion. Firms pre-qualified under this RFQ are not guaranteed a contract. Respondents selected for resulting contract(s) must be available to commence work on or before March 1, 2016.

**Subcontracting Requirement**

The Local Business Enterprise (LBE) subconsulting requirement for this Request for Qualifications (RFQ) and resulting contract(s) will be defined on a project-by-project basis. Pursuant to S.F. Administrative Code 14B, rating bonuses will be in effect for any Respondents who are certified as a Small- or Micro-LBE. See the RFQ Attachment II for more information.

**Schedule\***

RFQ issued	12-18-2015
Deadline for RFQ questions	01-08-2016 (3pm PST)
Answers to RFQ questions	01-13-2016
<b>Deadline for RFQ responses</b>	<b>01-25-2016 (3pm PST)</b>
Pre-qualification notification	02-15-2016

\*Each date subject to change.

**RFQ Questions and Communications**

To ensure fair and equal access to information about this RFQ, please e-mail your questions to [CentralContracts@sfgov.org](mailto:CentralContracts@sfgov.org). **Questions must be in writing and received by January 8, 2016 at 3pm PST and include in the subject line "RFQ#CON2015-18 Editing, Technical Writing, Electronic Publication Services."** No questions will be accepted after this time with the exception of City vendor compliance or Contract Monitoring Division subconsulting requirement questions. A summary of the questions and answers for this RFQ and important updates will be posted at this link: <http://mission.sfgov.org/OCABidPublication/BidDetail.aspx?K=10390>

# 1. Introduction

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General terms used in this RFQ. The "Respondent" refers to any entity submitting a response to this Request for Qualifications (RFQ) to be considered for inclusion on a pre-qualified consultant list. The "Contractor" refers to the Respondent(s) awarded contracts for services under this RFQ.

## 1.1 Statement of Need and Intent

What Does the City Seek? The City and County of San Francisco, California (City) seeks responses from firms demonstrating successful experience in providing editing, technical writing, other writing services, and multimedia electronic publication services to government agencies. These services will be used to assist the Office of the Controller - City Services Auditor (CSA), Administration Division (ADM), Accounting Operations and Systems Division (AOSD), Payroll and Personnel Services (PPSD), other divisions in the Controller's Office, other City departments, boards or commissions with improving the clarity, presentation and quality of its reports, policies and procedures and other documents and communications. Desired areas of expertise include government-related audit and analysis report editing; information technology systems procedures and training documentation; payroll and personnel services; staff style guides and templates for reports and memoranda; and public-facing newsletters and website content.

With Whom Will Contractors Work? Contractors will work with CSA, ADM, AOSD, PPSD and other Controller's Office staff, as well as with staff from the City's departments, boards and commissions, as applicable, for services provided.

What is the City's Intent with this RFQ? Based on responses to this RFQ, it is the intent of the City to create a pre-qualified list of firms from which the City shall choose prospective contractors on an as-needed basis for editing, technical writing other writing projects and multimedia electronic publication services indicated below in Section 2, Scope of Work. This consultant list may be utilized by the City, at its sole and absolute discretion, for contractor selection and negotiations for two years following the City's notice of intent to establish a pre-qualification list. No pre-qualified or selected Respondent is guaranteed a contract.

## 1.2 Background of City and County of San Francisco

What is the City? San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco, known as the "City", was established by Charter in 1850. It is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City's powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority. The services provided by the City include public protection, public transportation, construction and maintenance of all public facilities, water, parks, public health systems, social services, planning, tax collection and many others.

What are the Roles and Responsibilities of the City Controller's Office? The City Controller is the chief accounting officer and auditor for the City and responsible for all financial management systems, procedures, internal control processes and reports that disclose the fiscal condition of the City to managers, policy makers and citizens. The City Controller is also the auditor for the City performing financial and performance audits of departments, agencies, concessions and contracts.

Proposition C, passed by the City's voters in November 2003, amended City Charter Section 3.105 to instruct the City Controller to also serve as City Services Auditor. With this role, the Controller's Office is responsible for providing objective, rigorous measurement of City service levels and effectiveness and is authorized to contract with outside, independent *experts* for a variety of consultant services.

For more information regarding City Services Auditor roles and responsibilities, visit <http://www.sfgov.org/controller>.

Please see the [City Services Auditor Annual Work Plan, Fiscal Year 2015-16](#).

The Administration (ADM) is a division of the Controller's Office that provides centralized services for the Controller's Office including seven (7) major areas: Management Information Systems, Operations, Human Resources, Emergency Management, Central Finance, Central Contracts, and Civil Grand Jury Services.

The Controller's Office Accounting and Operations Division (AOSD) certifies City contracts, pays City vendors, approves personnel requisitions and reviews, monitors, controls and projects City department expenditures on a continuous basis to assess the City's overall fiscal condition. AOSD assists City departments in achieving fiscal compliance, as well as developing and maintaining accurate, timely and meaningful financial information.

The Payroll & Personnel Services Division (PPSD) is a division of the Controller's Office. PPCS provides payroll and personnel administration services to over 27,000 employees of City departments and ensures that employees receive the appropriate amount of pay. PPCS also calculates payroll taxes and social security, ensuring that they are properly withheld and processed in compliance with City, State, and Federal wage, and hour regulations. For more information regarding the Payroll & Personnel Services Division, visit <http://sfcontroller.org/index.aspx?page=480>.

## 2. Scope of Work

This scope of work is a general guide to the work the City expects to be performed, and is not a complete listing of all services that may be required or desired. The City is soliciting qualifications to create a pre-qualified list of consultant firms that may be selected for the services described below.

What if My Firm is Interested in Being Considered for More than One Service Area?  
Respondents are asked to indicate the Service Areas for which they would like to be considered in RFQ Attachment V, Response Template. Given the broad range of possible opportunities, we encourage firms to respond for all Service Areas for which they meet or exceed minimum qualifications as described in this RFQ. Please note that qualifications are evaluated separately for each Service Area.

Is My Firm Expected to Propose for a Specific Project? No. The Controller's Office will create a list of consultant firms to draw from for a diverse set of possible editing, technical, and other writing projects. Each Respondent should demonstrate its capabilities by providing concise, but comprehensive responses in RFQ Attachment V, Response Template, including representative Sample Products. The City will negotiate the specific scope of services, budget, deliverables and timeline with pre-qualified firms selected for contract negotiations. For example, for the contracts resulting from this RFQ, the contractor(s) may work on a project basis, with an engagement agreement for each project/task specifying the maximum number of hours, due date and hourly rate to be charged. There is no guarantee of a minimum amount of work or compensation for any Respondent(s) selected for contract negotiations. The City may select Contractors from the pre-qualified list in its sole and absolute discretion.

Please note that based on report issuance requirements, there may be instances in which a short turnaround time is required for services (24 hours or less).

Experience with Software Programs is highly desired:

To assist the City with use, modification, and ownership of work products created, developed, or edited by selected Contractors, it is highly desired that the respondent has familiarity with, and experience with the following software programs: Microsoft Office applications (Word, Publisher, PowerPoint, Excel, Adobe Acrobat, and other relevant software.)

Contractor(s) must be available for meetings during regular business hours (Monday-Friday, 8:00 a.m. to 5:00 p.m.) on an as-needed basis.

Demonstrated expertise is requested, but is not limited to, the following Service Areas:

### **2.1 Service Area 1: Editing Services**

This Service Area 1 includes but is not limited to Audit Report Editing, Management Report Editing, and Analysis Report Editing. Firms pre-qualified for work in this Service Area may be engaged for editing services on an as-needed basis for complex performance audit reports, investigative reports, surveys, and other complex analytical reports, written by Controller's Office—City Services Auditor (CSA) staff including auditors, analysts and project managers. Contractor(s) will provide services that may include conceptual, developmental, and organizational editing as well as editing and proofreading to improve clarity and correct grammar and punctuation. The goal is to enable a wide variety of readers, including citizens, the media, and policymakers, to read and understand CSA's documents and maximize the



impact of findings and recommendations. To this end, editing services will include recognizing and recommending opportunities to simplify, make more concise and direct, and emphasize the importance and weight of findings and other analysis in written materials covering complex technical issues, including proposing alternatives for and preparing tables and graphical representations of findings, analyses, summary information, and other data.

Examples of Contractor tasks include:

- Assist CSA staff in developing report outlines, surveys, and crafting report messages.
- Edit and/or proofread CSA's draft performance audit and other analytical reports, memorandums, and other documents.
- Using source documents that include narrative and/or quantitative audit or analytical data, propose and/or prepare summary data presentations, including tables, charts, and other graphical representations, to be included in CSA reports and presentations.
- Electronically edit files that are e-mailed to the Contractor by the City, using Microsoft Word or a compatible software program.
- Format documents to conform to CSA's established templates and style preferences, using software programs including Microsoft Office applications (Word, PowerPoint, Excel), and Adobe Acrobat.

CSA expects to require up to 500 hours of these editing services per year. CSA's reports usually range from 20-110 pages, but some reports may be shorter or longer.

## 2.2 Service Area 2: Technical Writing Services

Firms pre-qualified for work in this Service Area may be engaged for technical writing services on an as-needed basis that will enable it to communicate complex financial, accounting, contracting and systems procedures and legal requirements accurately, concisely and consistently to diverse audiences under tight time constraints. The City is interested in exploring current and emerging modes of communication such as web-based and audio-visual presentations. Contractor(s) may develop, update and maintain manuals, bulletins, directives, memoranda, presentations and other documents related to the City's financial and performance measurement systems. These documents may be distributed to City employees, including accounting, finance and contracts staff, system users, vendors, contractors and other interested stakeholders, including citizens and policymakers.

Examples of project tasks include:

- Development of Policies and Procedures for the following areas : Human Resources, Payroll and Personnel, Auditing and Accounting, Finance, Information Technology, Contracts, Civil Grand Jury, Operations, Emergency Management,
- Provide written, audio-visual or web-based communications tailored to different audiences in forms including, but not limited to: user guides, informational bulletins, flyers and memoranda, numerical tables and production/project timelines.
- Develop, format, update and maintain citywide systems procedure manuals and training documents (e.g., citywide payroll, personnel, accounting, information technology, and other systems).
- Design and update documentation of new and existing internal procedures; format into web-based presentation.
- Upon request, maintain, update, organize and provide to City accurate computer files for all written documents, procedures and reports.

- Edit text files that are e-mailed by the City, using Microsoft Word or a compatible software program.
- Be accessible by phone, e-mail, and in-person to meet with managers, staff, analysts, technicians, and functional users of procedures and systems to obtain information and assess service requirements on an as-needed basis.

The number of hours for technical writing services is to be determined. Project hours for the technical writing component will be dependent upon the progress and needs of staff in documenting the processes for testing, implementing, and evaluating the systems upgrade, and resulting policies and procedures.

### **2.3 Service Area 3: Other Writing Services**

Firms pre-qualified for work in this Service Area may be engaged for other writing services on an as-needed basis including developing style guides and templates for reports and memoranda and authoring text for public-facing newsletters and websites that will be engaging and understandable to a wide variety of readers, including citizens and policymakers. Activities might include reviewing current templates for reports and memoranda and suggesting improvements to incorporate industry best practices. Writing activities might include collecting content from Controller's Office contacts and writing and formatting newsletter articles, or providing text for the Controller's Office website.

The number of hours for other writing services is to be determined.

### **2.4 Service Area 4: Multimedia Electronic Publication**

Firms pre-qualified for work in this Service Area may be engaged for multimedia electronic publication services on an as-needed basis to consolidate multiple sources and disparate information to create a single document with common voice that will be distributed on a variety of modalities.

- Develop templates and format documents to conform to established templates and style preferences, using software programs including Microsoft Office applications (Word, PowerPoint, Excel, Access, Sharepoint) and Adobe Acrobat.

Examples of project tasks include:

- Publishing materials to SharePoint or websites and formatting to make it easier to find and navigate policies and procedures
- Website development
- Developing electronic publishing solutions that assist with the writing, editing and production of a variety of web-based communication projects including print collateral, web site content, email messaging, social media, and presentations
- Develop and maintain currency, accuracy and consistency of all core content.
- Document and create strategy to keep all electronic documentation up to date when further changes occur

The number of hours for other writing services is to be determined.

### 3. Response Requirements

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#### 3.1 Time and Place for Submission of Responses

**Responses and all related materials must be received by 3:00 pm PST on January 25, 2016 and delivered to the following:**

*Attention: Joyce Kimotsuki  
Office of the Controller  
City Hall, Room 306  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102*

Postmarks will not be considered in judging the timeliness of submissions. Responses submitted by e-mail will not be accepted. Late submissions will not be considered, including those submitted late due to mail or delivery service failure. Note that Respondents hand-delivering responses to City Hall may be required to open and make packages accessible for examination by security staff.

#### 3.2 Response Package

Complete but concise responses are recommended for ease of review by the Evaluation Team. Responses should provide a straightforward, concise description of the Respondent's capabilities to satisfy the requirements of the RFQ. Marketing and sales type information should be excluded. All parts, pages, figures and tables should be numbered and clearly labeled.

The following items must be included in your response and packaged in a box or envelope clearly marked **RFQ#CON2015-18 Editing, Technical Writing, Other Writing & Electronic Publication Services**.

**A. One (1) original printed response (with original signatures) labeled as "Original"**

*RFQ Attachment I Acknowledgement of RFQ Terms and Conditions*

*RFQ Attachment II Contract Monitoring Division Local Business Enterprise Forms - 2 copies*

*RFQ Attachment III City's Administrative Requirements*

*RFQ Attachment IV City's Agreement Terms and Conditions*

*RFQ Attachment V Response Template*

**B. One (1) flash or CD-ROM containing entire contents of response, including all Attachments (and Sample Products).** The CD-ROM and electronic files on the CD-ROM must be labeled with the Respondent's name. All files should be submitted in unprotected PDF or Word format.

**C. Seven (7) complete printed copies of RFQ Attachment V (including Sample Products).** Respondents are advised to review RFQ Attachments I through IV before beginning work on RFQ Attachment V to ensure they can meet the City's requirements.

#### 4. Evaluation Criteria

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This section describes the guidelines used for analyzing and evaluating the responses and for Respondent pre-qualification. It is the City's intent to pre-qualify Respondent(s) that provide the best overall qualifications to the City inclusive of fee considerations. Consultant firms selected for pre-qualification are not guaranteed a contract. This RFQ does not in any way limit the City's right to solicit contracts for similar or identical services if, in the City's sole and absolute discretion, it determines the pre-qualified list is inadequate to satisfy its needs.

##### 4.1 Initial Screening

The City will review each Response for initial determination on responsiveness and acceptability in an initial Screening process. Elements reviewed during the Initial Screening include, without limitation: Response completeness, compliance with format requirements, compliance with Minimum Qualification requirements, and verifiable references.

If you have any questions concerning the CMD Forms (Attachment II) and to ensure that your response is not rejected for failing to comply with S.F. Administrative Code Chapter 14B requirements, please contact Seth Benkle, the CMD Contract Compliance Officer for the Controller's Office at 415-581-2306 or by e-mail at Seth.Benkle@sfgov.org. The CMD Forms (Attachment II) will be reviewed during the initial screening process which is prior to the evaluation process. If the required CMD Forms (Attachment II) are not returned with the response, the response may be determined to be non-responsive, rejected, and Respondents will not be eligible to be selected to be on the Pre-qualified Consultant List for this RFQ.

Responses are not scored during the Initial Screening process. Initial Screening is a pass/fail determination as to whether a Response meets the threshold requirements described in Minimum Qualifications. A Response that fails to meet these requirements **will not** be eligible for consideration in the Evaluation Process described below in Section 4.3. The City reserves the right to request clarification from the Respondent prior to rejecting a Response for failure to meet the Initial Screening requirements. Clarifications are "limited exchanges" between the City and a Respondent for the purpose of clarifying certain aspects of the Response, and will not give a Respondent the opportunity to revise or modify its Response. Responses that meet the Initial Screening requirements shall proceed to the Evaluation Process described below in Section 4.3.

##### 4.2 Minimum Qualifications

The Minimum Qualifications are used by the City to determine whether the Respondent and the proposed staff have had experience on projects comparable to the services the City is requesting. Any response that does not demonstrate that the Respondent meets these minimum qualifications by the response deadline will be considered non-responsive and will not be evaluated or eligible for award of any subsequent contract(s).

The Respondent certifies that they meet the following minimum qualifications:

- A. **EXPERIENCE:** Respondent has submitted two (2) Prior Sample Product Descriptions, for EACH service for which Respondent would like to be considered for pre-qualification (i.e. Editing; Technical Writing; Other Writing; Multimedia Electronic Publication) as part of RFQ Attachment V response. The services described in the Prior Sample Product Description must have been provided to government clients within five (5) years from

the date of this RFQ and demonstrate successful completion of editing, technical writing, other writing services, or Multimedia Electronic Publication services. Each of these Sample Products may be submitted for multiple service areas but must demonstrate specific applicability to each service area. **To be considered for Audit Report Editing (within Service Area 1 Editing), Sample Products must include at least one (1) audit report. The one (1) audit report may be submitted as or in addition to the Sample Products for Editing.**

- B. MINIMUM OF 2 YEARS EXPERIENCE:** Each Respondent will be required to show evidence of having been in business for at least two (2) years. This can be evidenced by a City Business Tax License, Articles of Incorporation, partnership agreements, written contracts, income tax documents, or other documentation acceptable to the City as evidence of doing business.
- C. STAFFING:** The lead staff, including the Respondent's Project Manager and editor/writer/multimedia electronic publication lead(s), proposed to be assigned to the City's project(s) must individually have had a similar lead role in each of the Prior Sample Project Descriptions submitted for EACH SERVICE AREA. **To be considered for Audit Report Editing (within Service Area 1 Editing), the lead editor/writer/ proposed to the City must have been the lead editor/writer on both audit reports submitted as part of Sample Products.**

#### 4.3 Evaluation Criteria for Pre-qualification

##### **Evaluation Team**

City representatives will serve as the Evaluation Team responsible for evaluating Respondents. Specifically, the team will be responsible for the evaluation and rating of the responses for pre-qualification, for conducting reference checks, and for interviews, if desired by the City.

Each RFQ response that meets the Minimum Qualifications will be evaluated in accordance with the criteria below. A Respondent must receive a score of 70 points or above out of the 100 total possible points for each Service Area to be pre-qualified for that Service Area. There is no numerical limit to the number of firms that may be pre-qualified.

##### 4.3.1 Firm Qualifications – 10 points

- a) Respondent's firm history and structure, including total staff size and composition
- b) Respondent's experience providing editing and technical writing services to government agencies
- c) Pending litigation or litigation related to consulting services provided by firm
- d) Clients relationships severed for reasons other than convenience
- e) Respondent's capacity and resources to provide the services under this RFQ

##### 4.3.2 Staff Qualifications – 30 points

Applicability of proposed staff qualifications and education

##### Service Area 1. Editing

- Examples in this Service Area 1 include Audit, Management and Analysis reports
- Understanding of the Generally Accepted Government Auditing Standards in writing and editing reports
- Experience in conceptual and developmental editing

- Experience in survey editing
- Experience writing and and/or editing reports/documentation related to audits, highly complex and technical procedures, policies, legislation, operations and financial information system concepts for diverse audiences
- Expertise and familiarity with Microsoft Office software and advanced formatting functions
- Expertise in presenting complex data in tables, charts and other graphical formats for inclusion in audit reports and presentations

#### Service Area 2. Technical Writing

- Experience in developing/writing, updating and maintaining accurate and comprehensive manuals, bulletins, directives, memoranda, presentations, user documentation and/or other documents
- Expertise and familiarity with Microsoft Office software and advanced formatting functions
- Experience in communicating or presenting information through web-based, audio-visual or alternative modes of communication
- Experience in reviewing templates for reports or memoranda and suggesting improvements to incorporate industry best practices.
- Understanding of the Generally Accepted Government Auditing Standards in writing and editing reports (depending on project needs)

#### Service Area 3. Other Writing

- Experience in developing and reviewing guides and templates for reports or memoranda and suggesting improvements to incorporate industry best practices
- Experience in writing and formatting newsletter articles or providing text for websites

#### Service Area 4: Multimedia Electronic Publication

- Experience consolidating multiple content sources and disparate information, creating integrated documents with a common voice, distributed on a variety of modalities.
- Strong information technology skill set, including knowledge of and experience in the application of visual design principles. Proficient in e-publications, including HTML5 & SharePoint and other content management systems.
- Experience in website development.
- Experience writing, editing and production of a variety of web-based communication projects including print collateral, web site content, email messaging, social media, and presentations.
- Experience in developing and maintaining currency, accuracy and consistency of all core content across electronic media.

#### Education

- Preference: Educational credentials, such as a Bachelor's degree in English, Communication, or a related field, or a certificate of completion from a recognized technical writing professional school. An equivalent combination of training and experience may be substituted for a Bachelor's degree.

4.3.3 Quality and Comparability of Sample Products – 30 points

- a) Appropriateness of Sample Products to scope of work and comparability with City's needs
- b) Quality of presentation, including clarity of language, organizational structure, absence of errors and visual appeal
- c) Complexity of documents, including multilevel page numbering, charts, graphics, etc.

4.3.4 Project Approach and Cost – 20 points

- a) Expectations of client involvement or level of effort are appropriate, and questions demonstrate experience with providing services to comparable clients
- b) Sufficient expertise or methodology to create competitive differences that will be beneficial to the City is demonstrated
- c) Cost response is sufficiently detailed, reasonable and appropriate
- d) Rates

State clearly the project types (Service Area 1, 2, 3, 4) for which the hourly rates will apply. Separate rates for each Service Area, if different, should be submitted for those responding for more than one project type.

The City intends to select a respondent(s) that will provide the best overall services, and reserves the right to accept other than the lowest-hourly-rate offers and to reject all responses that are not responsive to this RFQ.

The City will negotiate costs and work effort with the selected Respondent to develop a firm fixed price for the contract utilizing a **blended hourly rate** to compensate Respondent for all services. No additional expenses are allowed, including reproduction costs associated with the services, as well as travel, lodging, meals, miscellaneous and any other expenses related to the completion of services. Additional and separate cost reimbursement will not be provided by the City.

Note that hourly rates provided shall apply to any and all as-needed services requested by the City for the full contract period under this RFQ, as applicable. Please see RFQ Attachment I, Section 13.

4.3.5 Completeness of Response Submission – 10 points

- a) Response conforms with RFQ requirements and concisely but comprehensively addresses RFQ requirements
- b) Response is professionally presented and contains organized content and format

**4.4 Contractor Selection Processes**

Respondents scoring 70 points and above will be added to the Pre-qualified List of Consultants for as-needed services. Due to the varied nature of the services to be performed, the City reserves the right to contract with any or all pre-qualified Respondents.

### Selection Interviews

Following the Response Evaluation process, Respondents may be invited to interviews with the Evaluation Team. Interviews, if pursued by the City, will consist of standard questions asked of all selected Respondents, and specific questions regarding individual responses. If interviews are conducted, they will be worth 100 points. The 100 Points possible awarded for interviews will be separate from the 100 points awarded during the Response Evaluation process. If the City elects to conduct interviews, the highest ranked Respondent will be determined based solely on points awarded in the interviews. The lead staff members that will be assigned to the project should be present for the interview, as well as the lead staff of other partner(s), including Local Business Enterprise firms.

The City has sole and absolute discretion over whether interviews will be conducted or not to select Respondents for contract negotiations.

### Reference Checks

Reference checks may be used to determine the applicability of Respondent experience to the services the City is requesting and the quality of services and staffing provided to prior clients; as well as adherence to schedules/budgets and Respondent's problem-solving, project management and communication abilities, as well as performance on deliverables and outcomes, and effectiveness in meeting or exceeding project objectives.

#### **4.5 Selection from Pre-qualified Lists of Consultants**

The City may select Contractors from the Pre-qualified List in its sole and absolute discretion. After the Pre-qualified List of Consultants has been established, the City may issue Request(s) for Quotes or Request(s) for Proposals, conduct selection interviews to the pre-qualified consultant list to better assess qualifications for a specific scope of service, which may include staffing, scheduling, deliverable, and cost considerations. The City reserves the right to request proposals or quotes from vendors in one service category or multiple service categories simultaneously. Award of contracts will be made in a manner consistent with San Francisco Administrative Code Chapter 21 Section 21.4(c).

#### **4.6 Other Terms and Conditions**

The selection of any pre-qualified Respondent for contract negotiations shall not imply acceptance by the City of all terms of the response, which may be subject to further negotiation and approvals before the City may be legally bound thereby.

If a satisfactory contract cannot be negotiated in a reasonable time with any pre-qualified Respondent, then the City, in its sole discretion, may terminate negotiations and begin contract negotiations with any other remaining pre-qualified Respondents.

The City, in its sole discretion, has the right to approve or disapprove any staff person assigned to a firm's projects before and throughout the contract term. The City reserves the right at any time to approve, disapprove or modify proposed project plans, timelines and deliverables. Such approvals will not be unreasonably withheld.

## **5. Protest Procedures**

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### **5.1 Protest of Non-Responsiveness Determination**

Within five (5) working days of the City's issuance of a notice of non-responsiveness, any consultant firm that has submitted a response and believes that the City has incorrectly



determined that its response is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth (5<sup>th</sup>) working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Respondent, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

## 5.2 Protest of Establishment of Pre-Qualified Consultant List

Within five (5) working days of the City's issuance of a notice of intent to establish a pre-qualified consultant list, any consultant firm that has submitted a responsive response and believes that the City has incorrectly selected another Respondent for pre-qualification may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth (5<sup>th</sup>) working day after the City's issuance of the notice of intent to establish a pre-qualified consultant list.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Respondent, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

## 5.3 Delivery of Protests

All protests must be received by the due date. Protests should be transmitted by a means that will objectively establish the date the City received the protest. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests or notice of protests made orally (e.g., by telephone) or by fax will not be considered. Protests must be delivered to:

E-mail:  
CentralContracts@sfgov.org

Mail:  
Joyce Kimotsuki, Contracts Manager  
Office of the Controller  
City Hall, Room 306  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

## 5.4 Protest Review

The Controller's Office will confirm receipt of notice of protest by Respondent.

If a Respondent submits a complete and timely protest, the Controller's Office will review notice of protest soon after receipt of the protest to determine validity of notice, including, but not limited to: (a) receipt by due date; (b) inclusion of a written statement specifying in detail each

and every one of the grounds asserted for the protest; (c) signed by an individual authorized to represent the Proposer; (d) citation of the law, rule, local ordinance, procedure or RFP provision on which the protest is based; and (e) specification of facts and evidence sufficient for the City to determine the validity of the protest. Protests not received within the time and manner specified will not be considered. The City, at its discretion, may make a determination regarding a protest without requesting further documents or information from the Respondent who submitted the protest. Accordingly, the initial protest must include all grounds of protest and all supporting documentation or evidence reasonably available to the prospective Respondent at the time the protest is submitted. If the Respondent later raises new grounds or evidence that were not included in the initial protest, but which could have been raised at that time, then the City may not consider such new grounds or new evidence. The review shall be an informal process conducted by the Controller's Office or its designee and will be based upon the information submitted by the Respondent in its protest letter. The Controller's Office will notify the Respondent in writing of its decision at the conclusion of the review. The decision of the Controller's Office is final.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CONTROLLER Dept. Code: CON

Type of Request:  Initial  Modification of an existing PSC (PSC # 3037 12/13)

Type of Approval:  Expedited  Regular ( Omit Posting)

Type of Service: Technical Writing, Editing, and Reporting Services

Funding Source: Department General Fund

PSC Original Approved Amount: \$45,000

PSC Original Approved Duration: 01/01/13 - 12/31/15 (2 years 52 w

PSC Mod#1 Amount: no amount added

PSC Mod#1 Duration: 01/01/16-12/31/17 (2 years 1 day)

PSC Mod#2 Amount: \_\_\_\_\_

PSC Mod#2 Duration: \_\_\_\_\_

PSC Cumulative Amount Proposed: \$45,000

PSC Cumulative Duration Proposed: 5 years

1. Description of Work

A. Scope of Work:

Provide technical writing, editing, and reporting services for the Controller's Payroll and Personnel Services Division for payroll system user guides, technical manuals, information bulletins, and other technical documents.

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

The ability to communicate technical information effectively, particularly regarding payroll-related issues, is critical to the operations of the City and the Controller's Office. The Controller's Office is required to provide a large amount of data and information to decision-makers, employees, vendors, citizens, and other governmental agencies. Services will enable the Controller's Office to ensure clear, accurate interpretation, comprehension, and implementation of complex, technical procedures and legal requirements under tight time constraints.

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.

Yes, PSC 3037 12 13

D. Will the contract(s) be renewed? Will the contract(s) be renewed: It is possible, subject to City's continued

2. Union Notification: On 07/10/15, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3037 12/13

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 12/10/2015

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

A. Specify required skills and/or expertise:

Contractor is required to have expertise in technical writing services, working with and writing about highly complex and technical payroll procedures, policies, legislation, and payroll system operations.

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

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

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

A. Explain why civil service classes are not applicable:

The IS Business Analyst positions listed above include technical writing in their job descriptions, but do not specifically include complex payroll policy and procedure services.

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

No. These services are short term, intermittent, highly specialized, and independent in 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? Explanation of training has not been provided by the department	<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? Lux will continue work	<input checked="" type="checkbox"/>	<input type="checkbox"/>

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD  
ON 07/10/15 BY:

Name: Joyce Kimotsuki Phone: (415) 554-6562 Email: joyce.kimotsuki@sfgov.org

Address: City Hall, Rm 306, 1 Dr. Carlton B. Goodlett | San Francisco, CA 94102

PERSONAL SERVICES CONTRACT SUMMARY

DATE: 10/25/12

DEPARTMENT NAME: Controller's Office DEPARTMENT NUMBER 09

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

TYPE OF REQUEST: [X] INITIAL REQUEST [ ] MODIFICATION (PSC# )

TYPE OF SERVICE: Technical Writing, Editing, and Reporting Services

FUNDING SOURCE: Department General Fund

PSC AMOUNT: \$45,000 PSC DURATION: 1/1/13 - 12/31/15

1. DESCRIPTION OF WORK

- A. Concise description of proposed work: Provide technical writing, editing, and reporting services for the Controller's Payroll and Personnel Services Division for payroll system user guides, technical manuals, information bulletins, and other technical documents.
B. Explain why this service is necessary and the consequences of denial: The ability to communicate technical information effectively, particularly regarding payroll-related issues, is critical to the operations of the City and the Controller's Office.
C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number): Most recently, this service has been provided through PSC#3026-08/09 and PSC#3115-11/12.
D. Will the contract(s) be renewed: It is possible, subject to City's continued satisfaction with services and contractor performance. If so, it would be through a new Request For Quotes, Request For Proposals, or Request For Qualifications.

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

Local 21 Union Name Signature of person mailing/faxing form Date 10/25/12
Union Name Signature of person mailing/faxing form Date
Union Name Signature of person mailing/faxing form Date
RFP sent to Local 21 Union Name on 10/25/12 Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3037-12/13

Approval Date: 10/31/2012

By: [Signature] Micki Callahan, Human Resources Director

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

- A. Specify required skills and/or expertise:  
*Contractor is required to have expertise in technical writing services, working with and writing about highly complex and technical payroll procedures, policies, legislation, and payroll system operations.*
- B. Which, if any, civil service class normally performs this work? *No civil service class normally performs this work, as it includes specialized skills and expertise in complex personnel and payroll processes. The closest civil service classes appear to be 1052 - IS Business Analyst, 1053 - IS Business Analyst-Senior and 1054 - IS Business Analyst-Principal, which include general technical writing knowledge that would not be sufficient to perform the description of work listed above.*
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: *No*

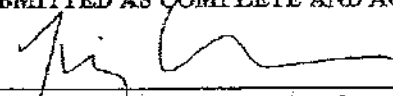
4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

- A. Explain why civil service classes are not applicable:  
*The IS Business Analyst positions listed above include technical writing in their job descriptions, but do not specifically include complex payroll policy and procedure services.*
- B. Would it be practical to adopt a new civil service class to perform this work? Explain.  
*No. These services are short term, intermittent, highly specialized, and independent in nature.*

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

- |  | <u>Yes</u>                          | <u>No</u>                           |
|--|-------------------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employees?   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employees?  | <input type="checkbox"/>            | <input checked="" 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 number to be trained.                                  |                                     |                                     |
| 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 personal services contract with your department? <i>Possibly, depending on which firm is awarded a contract.</i> | <input checked="" 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

Lily Conover  
\_\_\_\_\_  
Print or Type Name

415-554-7525  
\_\_\_\_\_  
Telephone Number

1 Dr Carlton B Goodlett Place  
\_\_\_\_\_  
San Francisco, CA 94102  
\_\_\_\_\_  
Address

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS

Dept. Code: DPW

Type of Request:  Initial  Modification of an existing PSC (PSC # 4041-13/14)

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

Type of Service: As-Needed Specifications Writing and Hardware Design Services

Funding Source: Inter-Departmental Work Orders

PSC Original Approved Amount: \$400,000

PSC Original Approved Duration: 12/01/13 - 12/31/18 (5 years 4 weeks)

PSC Mod#1 Amount: \$1,200,000

PSC Mod#1 Duration: 01/01/19-12/31/22 (4 years 1 day)

PSC Cumulative Amount Proposed: \$1,600,000 PSC Cumulative Duration Proposed: 9 years 4 weeks

**1. Description of Work**

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

Provide specialized services in Specifications Writing and Hardware Design to support Department of Public Works (DPW) design staff on an as-needed basis. The Consultants will provide expert advice and services to ensure that the most up to date products are utilized in our specifications. The City intends to award two (2) contracts for \$200,000 each.

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

Specifications Writers are specialized consultants who are experts in the area of writing specifications. They are up to date with the most current products, performance of such products, etc. We are currently working to improve the quality of our specifications and these experts have a knowledge base not readily available to the Buildings Design and Construction Division (BDC). In addition, our workload and staffing overall is such that we do not have time in the foreseeable future for staff to be researching and preparing specifications, whereas a specialized consultant in this field can expedite this process. Providing Hardware Specifications and Schedules is a highly specialized service that is out of the DPW BDC's area of expertise. The DPW BDC does not have the staff or ability to provide this service due to our current and on-going workload and staffing issues. Utilizing expert Hardware Consultants will allow us to complete our projects more quickly and provide a better quality of service to our Clients. If services are denied, DPW will have to rely more on current "as-needed" consultants as "pass through" consultants and pay additional administrative fees (i.e. subcontracting markup) and may even have to turn work away.

**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, through original approved PSC 4041-13/14.

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

No

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:  
The current pool of As-Needed contracts will be expiring early 2017. This PSC mod request will be to procure a new pool of contracts. Our As-Needed contracts can have a term of no more than 5 years.

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

- A. Display all that apply

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

Explain the qualifying circumstances:

This service is only needed when specification writing is required.

- B. Reason for the request for modification:

This Mod #1 Request is to increase the PSC amount and duration to award new master agreements for specifications writing.

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

- A. Specify required skills and/or expertise: Consultants must be experts in their fields and certified by corresponding organizations, as applicable. The firm must have a minimum of 10 years experience preparing specifications on general building projects. Firm must have experience on at least 5 public sector projects. Qualified personnel must have CSI certification (Construction Specifications Institute). California architect's registration required.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5120, Architectural Administrator; 5211, Eng/Arch/Landscape Arch Sr; 5212, Engineer/Architect Principal; 5260, Architectural Assistant 1; 5261, Architectural Assistant 2; 5265, Architectural Associate 1; 5266, Architectural Associate 2; 5268, Architect;

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

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

Not Applicable

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

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

These are as-needed contract services only. They will only be utilized when the following conditions exist: • Civil service classifications are applicable and City staff will be utilized where feasible. • The Division is working at full capacity and postponement of pending projects would be contrary to the public interest, or • Project requires special products and third party Consultant is required to ensure that a high quality project is achieved.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The services are only going



to be utilized on an as-needed basis and there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

**6. Additional Information**

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

No.

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

No training will be provided. Classifications already exist, but due to the workload of the City, this would pose delays if City employees had to take on this task as well.

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

No.

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

No.

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

No.

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

No.

**7. Union Notification:** On 06/24/16, 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: Stacey Camillo Phone: 415-554-4886 Email: stacey.camillo@sfdpw.org

Address: 1155 Market Street, 4th Floor, San Francisco, CA 94103

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4041-13/14

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

**Tsang, Tiffany (DPW)**

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**From:** dhr-psccordinator@sfgov.org on behalf of stacey.camillo@sfdpw.org  
**Sent:** Friday, June 24, 2016 11:40 AM  
**To:** Camillo, Stacey (DPW); L21PSCReview@ifpte21.org; Tsang, Tiffany (DPW); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Modification Request to PSC # 4041-13/14 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - PUBLIC WORKS – DPW has submitted a modification request for a Personal Services Contract (PSC) for \$1,200,000 for services for the period January 1, 2019 – December 31, 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/7655>

Email sent to the following addresses: L21PSCReview@ifpte21.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS - DPW Dept. Code: DPW

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

Type of Approval:  Expedited  Regular ( Omit Posting)

Type of Service: As-Needed Specifications Writing and Hardware Design Services

Funding Source: Inter-Departmental Work Orders PSC Duration: 5 years 4 weeks  
PSC Amount: \$400,000 PSC Est. Start Date: 12/01/2013 PSC Est. End Date: 12/31/2018

1. Description of Work

A. Scope of Work:

Provide specialized services in Specifications Writing and Hardware Design to support Department of Public Works (DPW) design staff on an as-needed basis. The Consultants will provide expert advice and services to ensure that the most up to date products are utilized in our specifications. The City intends to award two (2) contracts for \$200,000 each.

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

Specifications Writers are specialized consultants who are experts in the area of writing specifications. They are up to date with the most current products, performance of such products, etc. We are currently working to improve the quality of our specifications and these experts have a knowledge base not readily available to the Buildings Design and Construction Division (BDC). In addition, our workload and staffing overall is such that we do not have time in the foreseeable future for staff to be researching and preparing specifications, whereas a specialized consultant in this field can expedite this process. Providing Hardware Specifications and Schedules is a highly specialized service that is out of the DPW BDC's area of expertise. The DPW BDC does not have the staff or ability to provide this service due to our current and ongoing workload and staffing issues. Utilizing expert

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.

BDC Architects normally prepare the specifications and hardware designs of projects designed in-house. When special materials are required, or when staff is not available, outside Consultants are utilized through existing as-needed Architectural Consultant Contracts.

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

2. Union Notification: On none, the Department notified the following employee organizations of this PSC/RFP request: no unions notified

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4041-13/14

DHR Analysis/Recommendation: 11/04/2013

Commission Approval Required

DHR Approved for 11/04/2013

Approved by Civil Service Commission with conditions

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

**A. Specify required skills and/or expertise:**

Consultants must be experts in their fields and certified by corresponding organizations, as applicable. The firm must have a minimum of 10 years experience preparing specifications on general building projects. Firm must have experience on at least 5 public sector projects. Qualified personnel must have CSI certification (Construction Specifications Institute). California architect's registration required.

**B. Which, if any, civil service class(es) normally perform(s) this work?**  
5120,5211,5212,5260,5261,5265,5266,5268,

**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:**

These are as-needed contract services only. They will only be utilized when the following conditions exist:

- \* Civil service classifications are applicable and City staff will be utilized where feasible.
- \* The Division is working at full capacity and postponement of pending projects would be contrary to the public interest, or
- \* Project requires special products and third party Consultant is required to ensure that a high quality project is

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

No. The services are only going to be utilized on an as-needed basis and there is no ongoing demand that justifies the hiring of permanent City staff with the necessary expertise.

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

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

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

Name: Stacey Camillo Phone: 415-554-4886 Email: stacey.camillo@sfdpw.org

Address: 1155 Market Street, 4th Floor San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4123 12/13)

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

Type of Service: Nutrition Education Services to Schools and Community Based Organizations

Funding Source: State Grants

PSC Original Approved Amount: \$1,220,000

PSC Original Approved Duration: 10/01/13 - 09/30/16 (3 years)

PSC Mod#1 Amount: \$406,667

PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$282,033

PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$1,586,000

PSC Mod#3 Duration: 10/01/16-09/30/19 (3 years)

PSC Cumulative Amount Proposed: \$3,494,700

PSC Cumulative Duration Proposed: 6 years

1. Description of Work

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

Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.

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

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires Local Health Departments (LHD's) acting as lead agencies to contract portions of the State approved scope of work to community partners, including schools, non-profits and faith-based organizations. The consequences of denial would be an inability to comply with the terms of the grant award, resulting in loss of funding and the inability to provide these services which provide important local, community-based initiatives to promote healthy eating and physical activity in a variety of settings to targeted populations.

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

yes

D. Will the contract(s) be renewed?

Only if funding is available.

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

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

A. Display all that apply

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

Explain the qualifying circumstances:

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services.

The grant award requires lead agencies to contract out with community partners, including schools, non-profits and faith-based organizations. This contracting authority will allow compliance with the requirements of the grant.

B. Reason for the request for modification:

Received additional grant award for the new contract period

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

A. Specify required skills and/or expertise: The State grant funding these services requires that contractors have the ability to provide nutrition education to community partners and their clients, as well as the ability to provide technical assistance and training to community partners in order to ensure they are able to carry out the activities in the mandated scope of work.

B. Which, if any, civil service class(es) normally perform(s) this work? 2819, Assistant Health Educator; 2846, Nutritionist;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Civil service classes will be working in support of this grant, however, under the terms of the grant, the Local Health Department (LHD) must (sub)contract up to 50% of the awarded budget to schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations. The selected contract agencies must have access to and pre-existing partnerships with populations that are not readily available to City organizations.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the funding for the proposed contract is for a limited term and decreases over the term of the grant.

**6. Additional Information**



- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No, contractor will not train City employees. These services, nutrition education, require specialized knowledge and expertise, and is for a limited grant-funded duration only.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
See attached file:4123-1213 Nutrition Project WIC SNAP.p
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
18 Reasons, Children's Coun, SF Public Hlth Fdn, SFUnifiedSchoolD

7. **Union Notification:** On 06/20/16, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

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

Address: 101 Grovet St. rm. 307, San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4123 12/13

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

☰ Reply all | ▾ Delete Junk | ▾ ...

X

# FW: Receipt of Modification Request to PSC # 4123 12/13 - MODIFICATIONS

HJ

Hale, Jacquie (DPH)

Today 9:41 AM

Rossi, Ron (DPH) ✉



☰ Reply all | ▾

Inbox

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

From: dhr-psccordinator@sfgov.org [mailto:dhr-psccordinator@sfgov.org] On Behalf Of jacquie.hale@sfdph.org

Sent: Monday, June 20, 2016 6:33 PM

To: Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>; L21PSCReview@ifpte21.org; brenda\_mendieta@sfdph.org; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

Subject: Receipt of Modification Request to PSC # 4123 12/13 - 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 \$1,586,000 for services for the period October 1, 2016 – September 30, 2019. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/3808>

Email sent to the following addresses: L21PSCReview@ifpte21.org

## Additional Attachment(s)

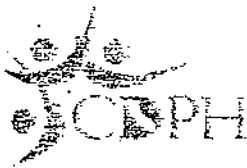
Attachment to 4123-12/13

Explanation of 5 plus years

These core health care services in nutrition education are expected to be ongoing in order to meet a continued and recurring need.

Attachment 1

State of California—Health and Human Services Agency  
California Department of Public Health



RON GIBBMAN, MD, MPH  
Director & State Health Officer



EDMUND G. BROWN JR.  
Governor

To: Supplemental Nutrition Assistance Program (SNAP) Education Partners in  
School Districts, County Offices of Education and Community-Based Organizations

FUTURE FUNDING FOR NUTRITION EDUCATION FROM THE NETWORK FOR A  
HEALTHY CALIFORNIA

I am writing to inform you of important changes concerning future funding from the *Network for a Healthy California* through the Supplemental Nutrition Assistance Program (SNAP) Education (SNAP-Ed) Program. Schools, school districts and county offices of education and non-profit community-based organizations have been the cornerstone of *Network* growth over the past decade. On behalf of the *Network* and the newly-formed Nutrition Education and Obesity Prevention (NEOP) Branch, I want to acknowledge with appreciation the role that you have played for many years in building the state's capacity for nutrition education. Together we have achieved significant milestones in educating low-income Californians about healthy eating and active living.

There are, however, changes to the funding structure of the *Network* that will reduce or eliminate the funds you may expect to receive in Federal Fiscal Year (FFY) 2014. *Network* contracts with schools, county offices of education, local initiatives, non-profit initiatives, regions and leadership projects will continue with the same scope of work and funding levels through September 30, 2013 to allow time for planning for new funding approaches starting in FFY 2014.

**Background:** Due to our success generating match funding in the program's early years, California receives fully one-third of SNAP-Ed national funds. Per USDA Guidance, SNAP-Ed funds should be allocated to reach all SNAP participants and low-income individuals eligible to receive SNAP benefits in an equitable manner and the *Healthy, Hunger-Free Kids Act*, enacted in December 2010, altered the SNAP-Ed funding mechanism to support this approach. Starting in 2014, USDA will increase the proportion of funding each state receives based on the level of SNAP participation rather than the amount of match generated. In future years, the new mechanism caps continued growth and reduces SNAP-Ed funding. On the program side, SNAP-Ed guidance now allows population-based, public health approaches and a focus on obesity prevention. USDA SNAP-Ed Guidance received in late March 2012 also contained greater emphasis on targeting low-income households, people in means-tested programs, and community environments in under-served areas.

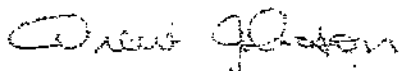
**Local Health Departments as Local Lead Agencies:** With the expectation of reduced funds in future years, the California Department of Social Services (CDSS), the lead agency for SNAP, and USDA approved a transition plan for SNAP-Ed to build California's public health capacity to achieve the state's obesity prevention goals. In FFY 2013 we will work to strengthen technical capacity for jurisdiction-wide leadership among 42 of California's 61 local health departments (LHDs) with 19 health jurisdictions following in FFY 2014. The LHD funding formulas align with the number of residents with incomes below 185 percent of the Federal Poverty Level. LHDs will serve as the local lead agencies in their jurisdictions due to their local expertise and statutory authority to ensure the public's health in their jurisdiction. This structure meets USDA's objectives of basing funding on need while ensuring long-term sustainability of effort in the face of decreasing funds. LHDs granted greater than \$500,000 will be required to subcontract up to 50 percent of the grant to school and community organizations for activities that support the overall strategies for obesity prevention in that jurisdiction. Additional funding opportunities will be made available through a CDPH-issued Request for Application for regional and statewide initiatives.

We plan to hold a conference call in October to review this information and to provide you with an opportunity to ask questions. Information about how to participate in that call will be shared in coming weeks. More information will come as well via e-mail communication and at the NEOP Statewide Collaborative meeting in November.

We urge local education and non-profit agencies to work with their usual contacts at the state to implement the FFY 2013 contract. For questions related to FFY 2014, please contact Michele Y. van Eyken, MPH, RD, NEOP Assistant Chief for Programs, at 916-552-9883 or [Michele.van.Eyken@cdph.ca.gov](mailto:Michele.van.Eyken@cdph.ca.gov) or Mr. Gil Sisneros, MPH, Assistant Chief for Administration, at 916-322-4253 or [Gil.Sisneros@cdph.ca.gov](mailto:Gil.Sisneros@cdph.ca.gov).

The California Department of Public Health remains committed to continuing strong relationships with local, regional and statewide partners and trust that we can count on your continued support on behalf of California's vulnerable children, youth and families.

Sincerely yours,



Drew Johnson  
Interim Deputy Director  
Center for Chronic Disease Control and Health Promotion  
California Department of Public Health

Supplemental Nutrition Assistance Program (SNAP) Education Partners in  
School Districts, County Offices of Education and Community-Based Organizations  
Page 3 of 3

Cc: Linda Patterson, Chief  
CalFresh Branch  
California Department of Social Services  
744 P Street, Sacramento, CA 95814-5512

Carol Chase Huegli, MS, RD  
Nutrition Education Administrator  
Nutrition Services Division  
California Department of Education  
1430 N Street  
Sacramento, CA 95814

Kathleen Billingsley, RN  
Chief Deputy Director for Programs and Policy  
California Department of Public Health  
1615 Capitol Avenue, Ste. 720; MS 0500  
Sacramento, CA 95814



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4123 12/13)

Type of Approval:  Expedited  Regular  Omit Posting

Type of Service: Nutrition Education Services to Schools and Community Based Organizations

Funding Source: <u>State Grants</u>	
PSC Original Approved Amount: <u>\$1,220,000</u>	PSC Original Approved Duration: <u>10/01/13 - 09/30/16 (3 years)</u>
PSC Mod#1 Amount: <u>\$406,667</u>	PSC Mod#1 Duration: <u>no duration added</u>
PSC Mod#2 Amount: <u>\$282,033</u>	PSC Mod#2 Duration: <u>no duration added</u>
PSC Cumulative Amount Proposed: <u>\$1,908,700</u>	PSC Cumulative Duration Proposed: <u>3 years</u>

1. Description of Work

A. Scope of Work:

Contractor will provide nutrition education and support services, with the goal of transforming environments in order to make healthy eating and physical activity possible in a variety of settings including schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations.

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

DPH is in receipt of a grant from the State Department of Public Health, Nutrition Education and Obesity Prevention Branch to act as a lead agency in funding local nutrition education services. The grant award requires Local Health Departments (LHD's) acting as lead agencies to contract portions of the State approved scope of work to community partners, including schools, non-profits and faith-based organizations. The consequences of denial would be an inability to comply with the terms of the grant award, resulting in loss of funding and the inability to provide these services which provide important local, community-based initiatives to promote healthy eating and physical activity in a variety of settings to targeted populations.

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

Yes

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

2. Union Notification: On 02/08/16 the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21;

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4123 12/13

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 03/21/2016

03/21/2016

Approved by Civil Service Commission

03/21/2016

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

A. Specify required skills and/or expertise:

The State grant funding these services requires that contractors have the ability to provide nutrition education to community partners and their clients, as well as the ability to provide technical assistance and training to community partners in order to ensure they are able to carry out the activities in the mandated scope of work.

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

2846,2819.

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

No.

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

A. Explain why civil service classes are not applicable:

Civil service classes will be working in support of this grant, however, under the terms of the grant, the Local Health Department (LHD) must (sub)contract up to 50% of the awarded budget to schools, community-based organizations, childcare settings, youth-serving environments and faith-based organizations. The selected contract agencies must have access to and pre-existing partnerships with populations that are not readily available to City organizations.

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

No, the funding for the proposed contract is for a limited term and decreases over the term of the grant.

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

	<u>YES</u>	<u>NO</u>
A. Will the contractor directly supervise City and County employee?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B. Will the contractor train City and County employee?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No, contractor will not train City employees. These services, nutrition educ		
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? See attached file:4123-1213 Nutrition Project WIC SN/	<input checked="" 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 checked="" type="checkbox"/>
F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? 18 Reasons, Children's Coun, SF Public Hlth Fdn, SFUnifiedSchoolD	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

ON 02/08/16 BY:

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

Address: 101 Grove St. rm. 307 San Francisco, CA 94102

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 4167 - 09/10)

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

Type of Service: Clinical and Financial software implementation & support assistance

Funding Source: General Funds, Federal, State

PSC Original Approved Amount: \$1,750,000

PSC Original Approved Duration: 07/01/10 - 06/30/17 (7 years 1 day)

PSC Mod#1 Amount: \$2,558,719

PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$2,125,000

PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$17,000,000

PSC Mod#3 Duration: 07/01/10-06/30/20 (3 years 1 day)

PSC Cumulative Amount Proposed: \$23,433,719

PSC Cumulative Duration Proposed: 10 years 2 days

**1. Description of Work**

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

The proposed professional services will provide software programming and implementation support to DPH IT staff for application systems included in the Siemens Medical Services Invision products. The Invision system is the foundation of Patient Registration, Scheduling, Billing and Clinical records for DPH patient care services in Acute Care, Primary Care and Long Term Care. These systems require enhancement and functional expansion periodically due to evolving program needs. It is also anticipated that additional service needs will arise to complete systems requirements for State and Federal patient care reimbursement regulations and direct patient care clinical services. The requested support services will also provide in-depth technical and system training for DPH information technology, clinical and administrative staff for on-going support and utilization of these systems. In addition, the Contractor will also provide Web-based remote data processing capabilities for healthcare data exchange required to link all provider sites and provide integrated clinical, demographic, and financial information across the Community Health Network system of the Department of Public Health. This applies only to the estimated professional services portion of the agreement.

**Scope Change**

This modification adds capacity necessary to professional services to allow the Department to begin the transition to a new Electronic Health Record while maintaining the existing Invision application, the current legacy application which supports clinical (lifetime clinical record), and financial operations (\$500 million in billable revenue).

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

The Health Commission passed a resolution on April 15, 2003, on the need to establish a single integrated clinical and fiscal Information and Technology platform across its spectrum of services including San Francisco General Hospital, Laguna Honda Hospital, Primary Care, and Behavioral Health.

It called for the continuation of current contracts for continued use of existing Invision software, and the implementation of healthcare application systems to integrate clinical and fiscal data, thereby enabling DPH to significantly enhance its patient service charge capture revenues and comply with regulatory mandates. The requested services are necessary to continue support and enhancement of existing systems and to bring functions to full production status in the complex public health environment. The Contractor will also provide the technical and functional training for employees to assume full responsibility for the ongoing operation and support of these applications. Denial of this request will significantly affect DPH's ability to increase revenues and may directly impact ongoing Patient Services Billing Operations at SFGH, LHH, and Primary Care, which total over \$500 million annually. These Invision software products will be immediately applicable to the goal of attaining Meaningful Use of Electronic Medical Records (EMR) at SFGH in the 2011-2015 timeframe and will greatly enhance the ability to qualify for approximately \$6-7 million in EMR-related incentive payments to be made available through the Federal American Recovery and Reinvestment Act (ARRA) Health Information Technology for Economic and Clinical Health (HITECH) grant program. It is anticipated that Hospital ARRA incentive payments will be made available in early 2012.

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.

4158-06/07

D. Will the contract(s) be renewed?

Yes, as needed.

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 is an installed and in production software application. Vendor support will be required for as long as the Department uses the application because the Department does not have the expertise to maintain or modify the system and the Department does not have access to the proprietary code that is the underlying structure of the system.

## 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:

This request is for the estimated amount of the professional services required to operate, maintain and support the applications that make up the lifetime clinical record for patients at the Department of Public Health. In addition this contract also provides for professional services for specific patient accounting, pharmacy and other clinical applications in use provided by the vendor.

B. Reason for the request for modification:

This modification adds capacity necessary to professional services to allow the Department to begin the transition to a new Electronic Health Record while maintaining the existing Invision application, the current legacy application which supports clinical (lifetime clinical record), and financial operations (\$500 million in billable revenue).

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

- A. Specify required skills and/or expertise: Knowledge of the technical aspects of existing Invision systems and implementation issues relating to new healthcare information systems. Ability to bring these new applications to full production status in all parts of the DPH, and train the IT, clinical and administrative staff to utilize and operationally support these systems.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1021, IS Administrator 1; 1022, IS Administrator 2; 1023, IS Administrator 3; 1024, IS Administrator-Supervisor; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1062, IS Programmer Analyst; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 1070, IS Project Director; 1071, IS Manager;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The Contractor will provide the proprietary software for local applications as well as the proprietary software and required hardware for remote data processing services.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
Civil service classes are not applicable due to the proprietary nature of the information systems, and the specific knowledge required to bring this new technology to full production status in the DPH environment. It is also necessary to augment existing DPH information systems positions with contractual support services to complete the healthcare business project deliverables due to the DPH-specific customization needs. Civil Service staff will work with the contractor in order to obtain the necessary knowledge for the day-to-day maintenance of the application.
- 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. Current classifications are appropriate for this work after the projects are implemented and training has been provided.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

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

No.

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

Cerner Health Services (assigned from Siemens Medical Solutions)

7. **Union Notification:** On 06/22/16, the Department notified the following employee organizations of this PSC/RFP request:

Prof & Tech Eng, Local 21; Municipal Executive Association;

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4167 - 09/10

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s).

Lee, Arlene (DPH)

---

**From:** Hale, Jacquie (DPH)  
**Sent:** Thursday, June 23, 2016 11:20 AM  
**To:** Longhitano, Robert (DPH); Lee, Arlene (DPH)  
**Subject:** FW: Receipt of Modification Request to PSC # 4167 - 09/10 - MODIFICATIONS

—Original Message—

**From:** dhr-psccordinator@sfgov.org [mailto:dhr-psccordinator@sfgov.org] On Behalf Of jacquie.hale@sfdph.org  
**Sent:** Wednesday, June 22, 2016 3:12 PM  
**To:** Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; camaguey@sfmea.com (contact) <camaguey@sfmea.com>; staff@sfmea.com; Longhitano, Robert (DPH) <robert.longhitano@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>  
**Subject:** Receipt of Modification Request to PSC # 4167 - 09/10 - 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 \$17,000,000 for services for the period July 1, 2010

– June 30, 2020. 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/7420>

Email sent to the following addresses: staff@sfmea.com camaguey@sfmea.com L21PSCReview@ifpte21.org amakayan@ifpte21.org



## Additional Attachment(s)

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

As these services require proprietary software and related expertise, available resources are not able to provide these services.

**6B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.**

Yes. Extensive technical and functional training will be provided to DPH IS Business Analysts, Programmers, Administrators and Managers on all systems, and to physicians, nurses, business and fiscal staff for the appropriate applications. Each classification will receive 4 to 8 hours of training as the systems are installed and implemented. It is intended that CCSF employees will be fully responsible for ongoing support of all applications once these are brought to full production status. CCSF staff will be fully engaged in all aspects of implementation and fully involved in all aspects of this process.



Edwin M. Lee  
Mayor

Barbara A. Garcia, MPA  
Director of Health

**MEMORANDUM**

DATE: 8/9/2013  
TO: DHR PSC Coordinator  
Department of Human Resources (Dept. 33)  
FROM: Jacquie Hale, PSC Coordinator  
Department of Public Health (Dept. #81) *JH*  
RE: Request for Administrative Approval of PSC Modification (less than 50%)

PSC No: 4167 09/10 Approval Date: 11/19/2012

Description of Service(s): Programmatic and Information Systems Support

Original Approved Amount:	<u>\$1,750,000</u>	Original Approved Duration:	<u>7/1/2010 - 6/30/2017</u>
Modification Amount #1:	<u>\$2,558,719</u>	1 <sup>st</sup> Modification of Duration:	<del><u>7/1/2010 - 6/30/2017</u></del> <i>No Change</i>
Modification Amount #2:	<u>\$2,150,000</u>	2 <sup>nd</sup> Modification of Duration:	<del><u>7/1/2010 - 6/30/2017</u></del> <i>No Change</i>
Total Amount as Modified:	<u>\$6,458,719</u>	Total Duration as Modified:	<u>7/1/2010 - 6/30/2017</u>

Reason for the modification:

For the possible procurement of additional support services to assist in the Department in achieving Meaningful Use requirements, ICD-10 transition, new Surgical (operating room) system,, and other possible requirements as a result of the implementation of the Affordable Care Act.

Attachment: Copy of Approved PSC Summary

(DPH Reference: various)

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

DHR ACTION:  Approved

Approval Date: 8/13/2013

By: *Micki Callahan*  
Micki Callahan, Human Resources Director



# CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE  
MAYOR

December 7, 2012

## NOTICE OF CIVIL SERVICE COMMISSION ACTION

**SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBERS 4048-12/13 THROUGH 4051-12/13; 4128-11/12; 4127-08/09; 4059-10/11 AND 4167-09/10.**

At its meeting of November 19, 2012 the Civil Service Commission had for its consideration the above matter.

**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.*

### The Commission:

- 1) Adopted the report; Approved the request for PSC #4048-12/13 as amended to reflect that the contract will be renewed annually; and on the condition that a report on the status of the work be submitted at the second year mark and the sixth year mark. Notified the Office of the Controller and the Office of Contract Administration.
- 2) Adopted the report; Approved the request for all remaining contracts. Notified the Office of the Controller and the Office of Contract Administration.

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

CIVIL SERVICE COMMISSION

JENNIFER JOHNSTON  
Executive Officer

### Attachment

- c:
- Cynthia Avakian, Airport Commission
  - Micki Callahan, Human Resources Director
  - Lily Conover, Controller's Office
  - Leorah Dang, Department of Human Resources
  - Aleric Degraffried, Public Utilities Commission
  - Jaci Fong, Office of Contract Administration
  - Jacque Hale, Department of Public Health
  - Shamica Jackson, Public Utilities Commission
  - LaWan Jones, Public Utilities Commission
  - William Lee, Department of Emergency Management
  - Ben Rosenfield, Controller
  - Shawn Wallace, San Francisco Police Department
  - Commission File
  - Chron

POSTING FOP  
11/19/2012

PROPOSED PERSONAL SERVICES CONTRACTS  
MODIFICATION TO INCREASE CONTRACT AMOUNT/DURATION

PSC No	Dept No	Dept Description	Approval Type	Modified Amount	Cumulative Total	Description of Work	Start Date - End Date
4128-11/12	09	Controller	Regular	\$290,000	\$390,000	Provide hosting services for historical payroll reports generated prior to October 2012. Payroll reports are accessed by every City department's payroll professionals, time keepers, and managers every pay period to validate payroll and deduction calculations through a partitioned access protocol with predefined search indexes.	9/1/2012 - 8/31/2017
4127-08/09	38	Police	Regular	\$200,000	\$400,000	The vendor will perform hair sample drug analysis to determine drug usage, and historical patterns of drug usage for police officer applicants, police reserve officer applicants, police cadet applicants, and police service aide applicants for the Police Department. Pre Employment Drug Testing is a Police Department requirement.	7/1/2009 - 6/30/2016
4059-10/11	82	Public Health	Regular	\$81,560	\$196,560	Services of an International Board Certified Lactation Consultant (IBCLC). The consultant will provide oversight, technical support, and training for Breastfeeding Peer Counselors, identify key community partners such as delivery hospitals, healthcare organizations, and providers and establish referral system connecting WIC-eligible clients to Peer Counselor services, leading efforts to educate community partners, delivery hospitals and health providers about breastfeeding and the breastfeeding support services offered by WIC and by the Peer Counselor Program Collaboratives, and the support efforts of the Peninsula Regional Breastfeeding Collaborative representative.	1/1/2011 - 12/31/2014
4167-09/10	82	Public Health	Regular	\$2,558,719	\$4,308,719	The proposed professional services will provide software programming and implementation support to DPH IT staff for application systems included in the Siemens Medical Services Invision products. The Invision system is the foundation of Patient Registration, Scheduling, Billing and Clinical records for DPH patient care services in Acute Care, Primary Care and Long Term Care. These systems require enhancement and functional expansion periodically due to evolving program needs. It is also anticipated that additional service needs will arise to complete systems requirements for State and Federal patient care reimbursement regulations and direct patient care clinical services. The requested support services will also provide in-depth technical and systems training for DPH information technology, clinical, and administrative staff for on-going support and utilization of these systems. In addition, the Contractor will also provide integrated clinical, demographic, and financial information across the Community Health Network system of the Department of Public Health. This applies only to the professional services portion of the agreement.	7/1/2010 - 6/30/2017
Sum of Modified Amounts:				\$3,130,279			

PERSONAL SERVICES CONTRACT SUMMARY

DATE: 4/17/2007

DEPARTMENT NAME: DEPARTMENT OF PUBLIC HEALTH DEPARTMENT NUMBER: 82

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

TYPE OF REQUEST: [X] INITIAL REQUEST [ ] MODIFICATION (PSC # [ ])

TYPE OF SERVICE: Clinical and Financial software implementation & support assistance.

FUNDING SOURCE: Dept. of Public Health (DPH) Funds

PSC AMOUNT: \$2,700,000 PSC DURATION: 7/1/2007 - 6/30/2012

1. DESCRIPTION OF WORK

A. Concise description of proposed work:

The proposed professional services will provide software programming and implementation support to CCSF DPH IT staff for application systems included in the Siemens Medical Services Invision and Soarian products. The Invision system is the foundation of Patient Registration, Scheduling, Billing and Clinical records for DPH patient care services in Acute Care, Primary Care and Long Term Care. These systems require enhancement and functional expansion periodically due to evolving CCSF/DPH program needs. A significant initiative which will require system enhancement is the recent CCSF legislation known as the San Francisco Health Access Plan (SFHAP) which will provide health care services for uninsured residents. It is also anticipated that additional service needs will arise to complete systems requirements for State and Federal patient care reimbursement regulations and direct patient care clinical services. The requested support services will also provide in-depth technical and system training for DPH information technology, clinical and administrative staff for on-going support and utilization of these systems. In addition, the Contractor will also provide Web-based remote data processing capabilities for healthcare data exchange required to link all provider sites and provide integrated clinical, demographic, and financial information across the Community Health Network system of the Department of Public Health. The amount of the PSC is Department's best estimate of the value of only the professional services during term of agreement.

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

The San Francisco Health Commission passed a resolution on April 15, 2003, on the need to establish a single integrated clinical and fiscal Information Technology platform across its spectrum of services including San Francisco General Hospital, Laguna Honda Hospital, Primary Care, Jail Health Services and Behavioral Health. The resolution called for the continuation of current contractual agreements for continued use of existing Invision Software, and to replace obsolete information systems for Long Term Care and Jail Health Services and the implementation of a new generation of healthcare application systems to integrate clinical and fiscal data, thereby enabling the Department to significantly enhance its patient service charge capture capabilities and comply with emerging regulatory mandates such as SB-1875 (Medication Error Control). The requested contractual services are necessary to continue support and enhancement of existing systems and to bring the new systems to full production status in the complex Public Health environment where feasible. Siemens will also provide the technical and functional training for CCSF/DPH employees to assume full responsibility for the on-going operation and support of these applications. Denial of these contractual services will significantly affect the Department's ability to enhance patient care charge capture and revenue generation, and may directly impact on-going Patient Services Billing Operations at San Francisco General Hospital, Laguna Honda Hospital and Primary Care which total over \$500 million annually.

Also, new regulatory compliance issues (SB-1875, Medication Error Control) and legislative initiatives (SFHAP) will depend on the implementation of new technology specifically designed to address these requirements.

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

These services were previously approved through PSC 4131 - 02/03 (for the period of 07/01/2004 - 6/30/2007).

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

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

Table with 3 columns: Union Name, Signature of person mailing/faxing form, Date. Rows include Local 21 (signed by Jacquie Hale, dated APR 23 2007) and DPG (dated APR 23 2007).

RFP sent to [Union Name], on [Date], Signature [Signature]

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4158-06/07

STAFF ANALYSIS/RECOMMENDATION: APPROVED May 21, 2007

CIVIL SERVICE COMMISSION ACTION:

**3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE**

**A. Specify required skills and/or expertise:**

Knowledge of the technical aspects of existing Invision Systems and implementation issues relating to a new generation of healthcare information systems. Ability to bring these new applications to full production status in all parts of the Department of Public Health, and train the CCSF/DPH information systems, clinical and administrative staff to utilize and operationally support these systems.

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

IS Administrators (1021, 1022, 1023, 1024), IS Business Analysts (1051, 1052, 1053, 1054), IS Programmer Analysts (1062, 1063, 1064), and IS Project Director, (1070) IS Manager (1071).

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

Yes. The contractor (Siemens Medical Solutions Health Services Corporation) will provide the proprietary software for local applications as well as the proprietary software and required hardware for remote data processing services.

**4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM**

**A. Explain why civil service classes are not applicable:**

Civil service classes are not applicable due to the proprietary nature of the Siemens information systems, and the specific knowledge required to bring this new technology to full production status in the DPH environment. It is also necessary to augment existing DPH information systems positions with contractual support services to complete the healthcare business project deliverables due to the DPH-specific customization needs.

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

No. Current classifications are appropriate for this work after the projects are implemented and training has been given.

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

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

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

B. Will the contractor train City and County employees?

<input checked="" 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.

Extensive technical and functional training will be provided to DPH IS Business Analysts, Programmers, Administrators and Managers on all systems, and to physicians, Nurses, business and fiscal staff for the appropriate applications. Each classification will receive 4 to 8 hours of training as the systems are installed and implemented. It is intended that CCSF employees will be fully responsible for on-going support of all applications once these are brought to full production status. CCSF staff will be fully engaged in all aspects of implementation and fully involved in all aspects of this process.

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"/>
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E. Has a board or commission determined that contracting is the most effective way to provide this service? The Health Commission passed a resolution on April 15, 2003.

<input checked="" type="checkbox"/>	<input type="checkbox"/>
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F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? *Siemens Medical Solutions Health Services Corp. will provide these services.*

<input checked="" 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

Jacquie Hale  
Jacquie Hale

(415) 554-2609

Print or Type Name

Telephone Number

101 Grove Street, Room 307

San Francisco, CA 94102

Address

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 40829 - 15/16)

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

Type of Service: Access to a web based facility management system for the Department of Public Health

Funding Source: General Fund

PSC Original Approved Amount: \$99,000

PSC Original Approved Duration: 04/01/16 - 05/31/21 (5 years 8 weeks)

PSC Mod#1 Amount: \$100,000

PSC Mod#1 Duration: 06/01/21-09/01/23 (2 years 13 weeks)

PSC Cumulative Amount Proposed: \$199,000

PSC Cumulative Duration Proposed: 7 years 22 weeks

**1. Description of Work**

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

The contractor will provide access to a fully hosted internet application that is used to maintain facility operations support; integrate, analyze and manage facility resources and personnel; assist with achieving compliance and tracking regulatory standards.

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

This system is necessary to better manage facilities, assist the Department in meeting regulatory standards. Denial will result in adverse patient care and reduced ability to fulfill public health missions.

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

Services have been provided in the past through earlier PSC request. See 40829 - 15/16

D. Will the contract(s) be renewed?

If there is continued need.

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

This system has been in use since 2006 for facilities management at Laguna Honda Hospital and the Department wishes to expand its use Department wide. A multi-year agreement will allow for the Department to maintain continuation of services as the system is expanded Department wide.

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

A. Display all that apply



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

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

Explain the qualifying circumstances:

These are proprietary services needed for facility program support. The City lacks the expertise to maintain this program.

B. Reason for the request for modification:

Adding funds for additional products and services required to achieve full system functionality requested by DPH. In addition, the term of the PSC is being extended, because of delay in contract negotiations. The services are for facility maintenance analysis, scheduling, reports breaking down facility cleaning requirements, setting up and implementing daily work assignments, quality assurance program, and identifying best practices.

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

A. Specify required skills and/or expertise: A commercially available internet based application for facilities support services that is used to maintain facility operations support; integrate, analyze and manage facility resources and personnel; assist with achieving compliance and tracking regulatory standards.

B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1070, IS Project Director; 1095, IT Operations Support Admin V;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide an off-site, fully-hosted, internet-based application.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

The developer of the system is the only provider of the system and all of the services. In addition, the application is proprietary and requires on-going maintenance, support and updates directly from the software distributor/developer.

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, these are specialized proprietary services provided only by the manufacturer.

**6. Additional Information**

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

No.

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

The contractor will train supervisory staff and their designees on how to use the system. The staff that will be trained how to use the application may include: 0931 Manager III, 0933 Manager I, 2738 Porter Assistant Supervisor, 2740 Porter Supervisor, and 2785 Assistant General Services Manager.

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

No.

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

No

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

No.

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

No.

**7. Union Notification:** On 06/28/16, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

Address: 101 Grove St., Room 307, San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40829 - 15/16

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 08/01/2016

# Receipt of Union Notification(s)

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**From:** Hale, Jacquie (DPH)  
**Sent:** Tuesday, June 28, 2016 11:11 AM  
**To:** Kyaun, Florence (DPH)  
**Subject:** FW: Receipt of Modification Request to PSC # 40829 - 15/16 - MODIFICATIONS

—Original Message—

**From:** dhr-psccordinator@sfgov.org [mailto:dhr-psccordinator@sfgov.org] On Behalf Of jacquie.hale@sfdph.org  
**Sent:** Tuesday, June 28, 2016 11:07 AM  
**To:** Hale, Jacquie (DPH) <jacquie.hale@sfdph.org>; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Kyaun, Florence (DPH) <florence.kyaun@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>  
**Subject:** Receipt of Modification Request to PSC # 40829 - 15/16 - 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 \$100,000 for services for the period July 1, 2016 – August 31, 2023. 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/7686>

Email sent to the following addresses: L21PSCReview@ifpte21.org amakayan@ifpte21.org

## Additional Attachment(s)

City and County of San Francisco



Edwin M. Lee  
Mayor

Department of Public Health  
Barbara A. Garcia, MPA  
Director of Health

**MEMORANDUM**

TO: Suzanne Choi, Citywide PSC Coordinator  
FROM: DPH Office of Contracts Management  
DATE: July 11, 2016  
SUBJECT: PSC 40829-15/16 Mod 1

Ms. Choi,

PSC 40829- 15/16 is for the acquisition of a facilities management software application system for LHH, ZSFGH, and DPH wide facilities. The system is used to assist supervisors and the Department to better manage and balance the overall operation of the environmental "housekeeping" function of DPH. The software, when we exercise the options, would include building out all of the software modules of the program to assist in the development of quality assurance, preventive maintenance schedules, tools to create schedules, training, and best practices. As part of procuring the system, there will be training on how to use the software, making this a L21 service.

Thank you,

DPH Office of Contracts Management

## 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: Access to a web based facility management system for the Department of Public HealthFunding Source: General FundPSC Duration: 5 years 8 weeksPSC Amount: \$99,000**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The contractor will provide access to a fully hosted internet application that is used to maintain facility operations support; integrate, analyze and manage facility resources and personnel; assist with achieving compliance and tracking regulatory standards.

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

This system is necessary to better manage facilities, assist the Department in meeting regulatory standards. Denial will result in adverse patient care and reduced ability to fulfill public health missions.

**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 occurred in the past through the City purchase order process. The Department is transitioning to a formal professional service contract.

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

If there is continued need.

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

This system has been in use since 2006 for facilities management at Laguna Honda Hospital and the Department wishes to expand its use Department wide. A five year agreement will allow for the Department to maintain continuation of services as the system is expanded Department wide.

**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:

These are proprietary services needed for facility program support. The City lacks the expertise to maintain this program.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A commercially available internet based application for facilities support services that is used to maintain facility operations support; integrate, analyze and manage facility resources and personnel; assist with achieving compliance and tracking regulatory standards.

B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1070, IS Project Director; 1095, IT Operations Support Admin V;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide an off-site, fully-hosted, Internet-based application.

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

These services are not provided within the City.

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

A. Explain why civil service classes are not applicable.

The developer of the system is the only provider of the system and all of the services. In addition, the application is proprietary and requires on-going maintenance, support and updates directly from the software distributor/developer.

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, these are specialized proprietary services provided only by the manufacturer.

6. Additional Information

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

No.

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

The contractor will train supervisory staff and their designees on how to use the system. The staff that will be trained how to use the application may include: 0931 Manager III, 0933 Manager I, 2738 Porter Assistant Supervisor, 2740 Porter Supervisor, and 2785 Assistant General Services Manager.

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

No.

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

No.



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

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

7. **Union Notification:** On 04/11/2016, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21, Prof & Tech Eng, Local 21, Professional & Tech Engrs, Local 21, Prof & Tech Eng, Local 21,

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

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

Address: 101 Grove St., Room 307 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40829 - 15/16

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 05/18/2016