



London Breed
Mayor

Carol Isen
Human Resources Director

Date: September 1, 2023

To: The Honorable Civil Service Commission

Through: Carol Isen
Human Resources Director

From: Michael DeLeon, DEC
Thomas Chen, DEM
Daniella Mattias, MYR
Amy Nuque, MTA
Shawndrea Hale / Daniel Kwon, PUC
Alexander Burns, DPW
Joan Lubamersky / Lynn Khaw, GSA
Jarrod Flores, ETH
Esperanza Zapien / Johanna Gendelman, DSS
Kelly Hiramoto, DPH

Subject: **Personal Services Contracts Approval Request**

This report contains twelve (12) personal services contracts (PSCs) in accordance with the revised Civil Service Commission (CSC) procedures for processing PSCs that became effective on November 5, 2014.

The services proposed by these contracts have been reviewed by Department of Human Resources (DHR) staff to evaluate whether the requesting departments have complied with City policy and procedures regarding PSCs. The proposed PSCs have been posted on the DHR website for seven (7) calendar days. CSC procedures for processing PSCs require that any appeal of these contracts be filed in the office of the CSC, Executive Officer during the posting period.

No timely appeals have been filed regarding the PSCs contained in this report. These proposed PSCs are being submitted to the CSC for ratification/approval.

DHR has prepared the following cost summary for personal services contracts that have been processed through the Department of Human Resources Fiscal Year 23/24 to date:

Total of this Report	YTD Expedited Approvals FY2023-2024	Total for FY2023-2024
\$19,116,000	\$321,291,956	\$2,487,932,924

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POSTING FOR

September 18, 2023

PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
48217 - 22/23	DEPARTMENT OF EARLY CHILDHOOD	\$10,000,000.00	Services are for the design, access, and support of information system solutions for the Department of Early Childhood (DEC). Information technology management system solutions are defined as technology-based systems that assist DEC staff and clients by providing childcare web-based waitlist; Program Evaluation and Assessment systems; Website Creation and Content Development Applications; contract management; and other ancillary services including training, technical support, installations, and upgrades of DEC's information technology.	October 1, 2023	September 30, 2028	REGULAR
45369 - 23/24	DEPARTMENT OF EMERGENCY MANAGEMENT	\$3,000,000.00	Department of Emergency Management (DEM) needs to upgrade its NICE Logger system because the current system was sunsetted in December 2022. DEM wishes to procure a total upgraded INFORM V10 system consisting of all existing four hundred seventy-six (476) primary telephony channels and provide Inform software access to SFDEM's redundant 120-channel IP radio loggers from Contractor Motorola Solutions Inc	January 1, 2023	December 31, 2033	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
40707 - 22/23	MAYOR	\$2,000,000.00	To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.	November 1, 2023	October 31, 2028	REGULAR
41564 - 23/24	MUNICIPAL TRANSPORTATION AGENCY	\$410,000.00	The consultant will provide required training to the San Francisco Municipal Transportation Agency (SFMTA) police service dogs (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards. The canines and police officers will then be qualified and TSA-certified to work when explosives detection is required within the SFMTA transit system.	September 4, 2023	September 4, 2028	REGULAR
41489 - 23/24	PUBLIC UTILITIES COMMISSION	\$155,000.00	Annual maintenance and service of 3 generators PUC Power maintains on Treasure Island and Yerba Buena Island plus any spot repairs as needed. Service includes: Cooling system/Coolant; Air Intake	September 1, 2023	September 1, 2028	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			system; Exhaust system; Electrical system; Fuel checks; Diesel Engine check; Engine Running check and Battery and Charge check.			
<u>49028 - 23/24</u>	PUBLIC UTILITIES COMMISSION	\$1,000,000.00	The purpose of this contract is to provide maintenance, calibration and repair services, and certification of the truck and hopper scales throughout the Wastewater Enterprise (WWE) for the City and County of San Francisco, Public Utilities Commission (SFPUC). Work under this contract may include maintenance and repair to the load cells, load stands, indicators, microcells, junction boxes, ticket printers and troubleshooting truck and hopper scale software programs. Work will also include load scale testing and calibration using contractor's certified test weights, test trailer and test truck.	February 1, 2024	January 31, 2029	REGULAR
<u>48886 - 23/24</u>	GENERAL SERVICES AGENCY - PUBLIC WORKS	\$500,000.00	Public Works is implementing a construction project management system software solution to integrate various systems related to project delivery processes and enhance financial management capabilities. The selected vendor will be responsible for the implementation and ongoing support of the System, ensuring its successful integration with existing systems while providing functional and technical assistance as needed. These services will be used to assist the Departments with system enhancements, modifications and additional systems support.	August 28, 2023	August 28, 2028	REGULAR

TOTAL AMOUNT \$17,065,000

Posting For September 18, 2023

Proposed Modifications to Personal Services Contracts

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
43644 - 22/23 - MODIFICATIONS	GENERAL SERVICES AGENCY - CITY ADMIN -- ADM	\$750,000	\$1,000,000	The Permit Center seeks professional services to implement a streamlined and digital workflow solution, including data collecting and sharing. The professional services will configure and implement an inspection scheduler and workflow tool to digitize, streamline, and automate the inspection processes involving multiple inspecting departments. The tool will allow customers to schedule on-site inspections and collect data from the applicant prior to arrival. The workflow tool also allows multiple departments to access and view the data, make updates to the data prior to inspection, and allows departments to collect and record new data during the mobile inspection process. The services will provide a technology solution that provides an integrated and complete digital workflow. The solution will also be scalable to other use cases across multiple permitting and inspection services across the Permit Center.	07/25/2023	04/30/2026	REGULAR
40949 - 16/17 - MODIFICATIONS	ETHICS COMMISSION -- ETH	\$0	\$1,374,750	The Ethics Commission currently contracts with a private vendor to provide an electronic filing system to file ethics forms and maintain its filing records databases. The forms include Fair Political Practices Commission	07/01/2024	06/30/2026	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
				<p>(FPPC) and local campaign finance forms, Statement of Economic Interests, lobbyist reports and campaign consultant reports. The Secretary of State's approval is required for filing systems that submit electronic FPPC campaign finance forms and the Ethics Commission can only contract with vendors on the Secretary of State's certified vendor list. The FPPC's approval is required for filing systems that submit electronic Statement of Economic Interest filings. The Ethics Commission requires a service that includes web-based filing software for filers, a back-office administration system, a database, and a search engine for online public disclosure. This system must be hosted by the vendor's server infrastructure. This personal services contract will include developing additional components for the Ethics Commission's existing electronic filing system, technical support, and system maintenance. The new components include new reporting requirements for Expenditure Lobbyists as required by Measure C (adopted by San Francisco voters in the November 3, 2015 election), new electronic forms required by the Committee on Information Technology (COIT)-funded Efiling Conversion Project, and new lobbyist registration requirements included in Measure T (adopted by San Francisco voters in the November 8,</p>			

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
49252 - 21/22 - MODIFICATIONS	HUMAN SERVICES -- DSS	\$1,000,000	\$2,026,131	<p>2016 election). On January 20, 2017, the Mayor signed into law an ordinance requiring the electronic filing of behested payment reports by City boards and commissions, which becomes operative on January 1, 2018. The new contract will also provide flexibility to add additional forms and functionality to the system when new legislation is passed during the contract term.</p> <p>The scope of work shall include technical assistance and best practices in the implementation and evaluation of FFPSA prevention programs and services in the following areas: prevention program development and implementation that leverages a public and private partner network; determining funding sources for services; developing provider and San Francisco Human Services Agency capacity and processes to capture services costs in alignment with Family First Prevention Place Services Act requirements and California Department of Social Services instructions for claiming; continuous quality improvement utilizing programmatic and data evaluation and findings; and related coaching, supervision, and capacity building. The expected outcome is development and implementation of an integrated citywide plan that increases economic stability, reduces child maltreatment,</p>	11/24/2021	10/31/2026	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
31207 - 18/19 - MODIFICATIONS	PUBLIC HEALTH -- DPH	\$166,000	\$300,000	<p>and improves child welfare permanency outcomes through coordinated prevention programs provided to children, youth and families of the City and County of San Francisco.</p> <p>Contractor will provide rental and maintenance of ten 55-gallon, 4-foot aquaria located inside Laguna Honda Hospital (LHH) and one 8-foot aquarium located on the esplanade of the hospital. Maintenance will include regular feeding of fish and related aquaria animals using automated feeders, at least biweekly evaluation of all aquaria for cleaning and/or repair, and provision of those services as indicated. Results of the evaluation/quality assurance to be shared weekly with Director of Therapeutic Activities and Wellness Department, or their designee.</p> <p>Contractor will supply all aquaria with appropriate or agreed upon number of fish and any other related animals, and to replace all fish that may die during the course of the contract. Contractor will also provide 24-hour, on-call service for any problems that may occur, such as dead fish, equipment malfunction, or dirty tank conditions, and resolve those problems within 24 hours of the call. Contractor will maintain liaison with the Therapeutic Activities and Wellness Department regarding the operation and condition of the aquaria.</p>	07/21/2023	10/31/2028	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
31236 - 20/21 - MODIFICATIONS	PUBLIC HEALTH -- DPH	\$135,000	\$234,000	The contractor(s) will provide as-needed repairs and intermittent equipment maintenance for the Department's floor maintenance equipment, which at present is primarily at Zuckerberg San Francisco General Hospital. Equipment requiring these services includes floor cleaning machines, floor buffers, floor burnishers, floor ride-on machines, and other similar equipment. At present, ZSFG must maintain 150-200 equipment items in order to maintain full maintenance capacity. (Note: These are longtime continuing services which previously had not been included as needing PSC approval.)	08/31/2023	08/31/2025	REGULAR
TOTAL AMOUNT \$2,051,000							

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: Department of Early Childhood -- DEC

Dept. Code: DEC

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

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

Type of Service: Information Technology Management System

Funding Source: County, State, & Federal

PSC Duration: 5 years 1 day

PSC Amount: \$10,000,000

1. Description of Work

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

Services are for the design, access, and support of information system solutions for the Department of Early Childhood (DEC). Information technology management system solutions are defined as technology-based systems that assist DEC staff and clients by providing childcare web-based waitlist; Program Evaluation and Assessment systems; Website Creation and Content Development Applications; contract management; and other ancillary services including training, technical support, installations, and upgrades of DEC's information technology.

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

These services are required to process and manage client and/or grantee mandated information that is necessary for the day-to-day operation of DEC. Without these services, operations would be interrupted and will not be able to fulfill childcare enrollment, evaluate effectiveness of the childcare programs and services, and create communication strategies to implement childcare programs and services.

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

Services were previously approved through PSC 43367 – 17/18.

D. Will the contract(s) be renewed?

Yes, based upon funding and performance.

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.

Previous PSC 43367-17/18. The Department of Early Childhood (DEC) is a new City department. All existing PSC contracts are under the former department. DEC will attempt to amend as many contracts under the new department as possible and use the new PSC for future information technology management system.

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:

These services require technical knowledge, subject/content matter expertise, as well as knowledge on a particular field of database management, program evaluation and assessments, and communication strategies.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Specialized skills in programming, integration, and management of information technology systems. These tend to be proprietary business solutions that have been previously developed and are used by multiple agencies across many states and counties.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1063, IS Programmer Analyst-Senior;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
No. Information management system do not require facilities and/or physical equipment currently possessed by the City.

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

These services are highly specialized and mostly proprietary business solutions that are used by multiple agencies across many states and counties in packages that utilize inter-county data reporting, sharing, and system-wide compliance updates at all levels.

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

- A. Explain why civil service classes are not applicable.
These services are mostly proprietary business solutions that are used by multiple agencies across many states and counties in packages that utilize inter-county data reporting, sharing, and system-wide compliance updates at all levels.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, because the work needed would need to span and coordinate with multiple municipalities and/or the project is highly specialized and would best be performed by an independent organization that has specific expertise with similar projects.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. Training is for the end-users on how to use online applications for applying for childcare services and programs.
- 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 06/13/2023, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP; 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: Michael DeLeon Phone: Email: michael.deleon@sfgov.org

Address: 1650 Mission St. Suite 312 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48217 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of michael.deleon@sfgov.org
To: [RECEIPT for Union Notification for PSC 48217 - 22/23 more than \\$100k](mailto:De Leon, Michael (DEC); SF-DHR-Info@seiu1021.org; Najuawanda Daniels; Jason Klumb; Frigault, Noah (HRC); Julie.Meyers@sfgov.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconillo@sfgwater.org; pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David.Canham; jtanner940@aol.com; Laxamana, Junko (DBI); ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; De Leon, Michael (DEC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over $100K PSC # 48217 - 22/23
Date: Tuesday, June 13, 2023 1:26:57 PM</p><hr/></div><div data-bbox=)

The Department of Early Childhood -- DEC has submitted a request for a Personal Services Contract (PSC) 48217 - 22/23 for \$10,000,000 for Initial Request services for the period 07/01/2023 – 06/30/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/20446> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: Initial Modification of an existing PSC (PSC # 43367 - 17/18)

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

Type of Service: Information Technology System Solutions

Funding Source: County, State, Federal

PSC Original Approved Amount: \$26,000,000 PSC Original Approved Duration: 07/01/18 - 06/30/23 (5 years)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/18-06/30/24 (1 year 1 day)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/18-06/30/26 (2 years)

PSC Cumulative Amount Proposed: \$26,000,000 PSC Cumulative Duration Proposed: 8 years 1 day

1. Description of Work

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

Services are for the design, access, and support of information technology system solutions for the Human Services Agency. Information technology system solutions are defined as technology based systems that assist the HSA staff and clients by providing Database Applications; Client Management Software; Management Information Systems; Client Assessment Systems; Program Evaluation Systems; Program Assessment Systems ; IT System Consulting; Cloud Services; Transportation Management/Scheduling Software; Website Creation & Content Development Applications; and other ancillary services including training, technical support, installations, and upgrades of HSA's information technology system solutions.

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

These services are required to process and manage client and court mandated information, and are necessary for the day to day operation of the Agency. Without these services, operations would be interrupted and the Agency could not fulfill welfare and institutions code compliance.

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

Services have been provided in the past through earlier PSC request. See 43367 - 17/18

D. Will the contract(s) be renewed?

Yes, based upon funding, performance and procurement.

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

This PSC is for multiple IT contracts for HSA. Several of these contracts have been extended and now need the PSC to extend to match the contract term.

2. Reason(s) for the Request

A. Display all that apply

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

Other (be specific and attach any relevant supporting documents):

REASON FOR CHECKING OTHER:

This PSC is being created to divide the HSA's previous grouped supportive services PSC in to a more definitive IT system services PSC. We are narrowing the focus of existing PSCs for existing contracts.

Explain the qualifying circumstances:

These are generally for large scale IT projects that require both technological knowledge as well as knowledge on a particular field of social services. Examples might include developing a database to track service openings in child care or data analytical systems off of a state wide database.

B. Reason for the request for modification:

To add an additional two years due to a contract under this PSC being extended.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Creating IT based supportive systems is a very specialized service in programming and the expertise to integrate, manage, and support these systems requires specialized knowledge of the contracted system and compliance mandates. These tend to be proprietary business solutions that have been previously developed and are used by multiple agencies across many states and counties.

B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1063, IS Programmer Analyst-Senior;

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

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

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 services are mostly proprietary business solutions that are used by multiple agencies across many states and counties in packages that utilize inter-county data reporting, sharing, and system-wide compliance updates at all levels. Creating IT based supportive systems for the HSA is a very specialized service and the expertise to integrate, manage, and support these systems requires specialized knowledge of the system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No as the work needed would need to span and coordinate with multiple municipalities and/or the project is highly specialized and would best to be performed by an independent organization that has specific expertise with similar projects.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Training is on the use of the final product for end-users. These are mostly online or in-application but can be intermittently on-site a few times per year as needed. End-users are HSA staff and others who work directly with HSA clients to through contracted services and programs.

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

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

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

No.

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

No.

7. **Union Notification:** On 06/08/22, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, SFAPP; 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: Phone: 557-5657 Email: esperanza.zapien@sfgov.org

Address: 1650 Mission St #300, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43367 - 17/18

DHR Analysis/Recommendation:

09/19/2022

Commission Approval Required

Approved by Civil Service Commission

09/19/2022 DHR Approved for 09/19/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD

Dept. Code: ECD

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

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

Type of Service: IT Services - NICE Upgrade

Funding Source: General Fund

PSC Amount: \$3,000,000

PSC Est. Start Date: 01/01/2023

PSC Est. End Date 12/31/2033

1. Description of Work

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

Department of Emergency Management (DEM) needs to upgrade its NICE Logger system because the current system was sunsetted in December 2022. DEM wishes to procure a total upgraded INFORM V10 system consisting of all existing four hundred seventy-six (476) primary telephony channels and provide Inform software access to SFDEM's redundant 120-channel IP radio loggers from Contractor Motorola Solutions Inc

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

DEM is required under law to record all 911 calls, Computer-Aided Dispatch (CAD) screens, and radio traffic. The City Public Safety Answering Point (PSAP) must keep proper records of all public safety communications for three (3) years, and the current NICE Logger System is no longer supported. If this upgrade doesn't happen, we can jeopardize the reliability of existing records and the ability to solve any issues in the current system. Additionally, INFORM software access to SFDEM's redundant IP radio loggers from Motorola will be lost due to incomparability. This is also a requirement of the Radio Replacement project. The NICE Inform solution is a recorder software application that empowers agencies to monitor, review, reconstruct, and share incidents.

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, NICE Systems Inc, our current vendor, has provided the service. We have received an OCA waiver to do a 21.30 – sole source

D. Will the contract(s) be renewed?

No this will be a contract that runs for 9 years. Upgrade is expected to be completed by then.

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.

Ongoing Radio Upgrade project lead by Department of Emergency Management(DEM), but for citywide.

2. Reason(s) for the Request

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

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

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

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

B. Explain the qualifying circumstances:

- The Nice Logger system keeps records of all 911 Calls, Radio Communications, and CAD Screens for the City of San Francisco PSAP. The current version and hardware were sunsetted in December 2022. DEM needs to keep its history for over three (3) years, and therefore we need to upgrade our application because this current app and hardware are not supported anymore. We also have a requirement under the radio project to upgrade to the next version for the NICE system to be comparable with the radio system.
- The vendor will install all appropriate new hardware and provide gold maintenance and software upgrades of the applications.
- This is all proprietary technology and services not available at the city.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: In depth knowledge of radio system

B. Which, if any, civil service class(es) normally perform(s) this work? 1094, IT Operations Support Admin IV;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No – this is a propriety system and will be maintained by the contractor

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

The NICE Logger services are unavailable through other City Agencies or City Services. DEM 911 PSAP and Public Safety agencies rely on recovering proper records of any incidents or emergencies affecting the city, which are stored in the existing system.

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

A. Explain why civil service classes are not applicable.

This is a proprietary system which requires specific knowledge on radio system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. This is a proprietary system and it is an one time project. This work is temporary in nature and it would not make sense operationalize this position moving forward.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. The training will cover the equipment operation, not its installation. Description: • NICE Inform Health Manager 1/2 day / 4-hour instructor-led end-user training for Basic / Operator users. • Up to 6 students. Delivered remotely by default. • 7362, Communications Systems Technicians, 7368 Sr. Communications Systems Technicians, 0923 Radio Operations, Program Manager, 0931 Public Safety Radio Systems 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.
Yes. The agreement was awarded to this contractor based on a sole source procurement request;
OCAWVR00080338

7. **Union Notification:** On 07/03/2023, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Management & Superv 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: Thomas Chen Phone: 4152696562 Email: Thomas.Chen@sfgov.org

Address: 1011 Turk Street San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45369 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Chen, Thomas (DEM)

From: dhr-psccordinator@sfgov.org on behalf of Thomas.Chen@sfgov.org
Sent: Monday, July 3, 2023 2:53 PM
To: Chen, Thomas (DEM); agarza@ifpte21.org; Laxamana, Junko (DBI); dho@ifpte21.org; ewallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; Chen, Thomas (DEM); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 45369 - 23/24

RECEIPT for Union Notification for PSC 45369 - 23/24 more than \$100k

The DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD has submitted a request for a Personal Services Contract (PSC) 45369 - 23/24 for \$3,000,000 for Initial Request services for the period 01/01/2023 – 12/31/2033. Notification of 30 days (60 days for SEIU) is required.

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

<https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F21043&data=05%7C01%7CThomas.Chen%40sfgov.org%7C8869323491914d6727ec08db7c0ffa23%7C22d5c2cfce3e443d9a7fdfc0231f73f%7C0%7C0%7C638240180295545195%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzliLjBtIi6k1haWwiLCJXVCi6Mn0%3D%7C3000%7C%7C%7C&sdata=CihI4KTKvIVZsn1OryEQ7%2B0Pq0w6vQLwM7w7Qg5IfpM%3D&reserved=0> 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)

Report Title: OCA Waiver Details
Run Date and Time: 2023-07-03 13:57:14 Pacific Daylight Time
Run by: Thomas Chen
Table name: u_oca_waiver

OCA Waiver

Number:	OCAWVR0007617	Request Status:	Rejected by Supervising purchaser
Requested for:	Juan Soto	State:	Rejected
Department Head/Delegated authority:	William Lee	Waiver Type:	Solicitation Waiver
Opened:	2023-04-06 10:07:32	Awaiting Info from:	
		Awaiting Info reason:	
		Requesting Department:	DEM
		Requester Phone:	+14155583822
		Opened by:	Rachel Emanuel
		Watch list:	

Short Description:

NICE upgrade for DEM - phone/radio/screen

Supplier ID:	0000014284	Requested Amount:	\$3,000,000.00
Is this a new waiver or are you modifying a previously approved waiver?:	New Waiver	Increase Amount:	\$0.00
Last Approved OCA Waiver Request:		Previously Approved Amount:	\$0.00
		Total Requested Amount:	\$3,000,000.00
Document Type:	Contract	Enter Contract ID:	
		Enter Requisition ID:	
		Enter Purchase Order ID:	

Advertising:

false

Commodities, Equipment and Hardware :

true

Equipment and Vehicle Lease:

false

On Premise Software and Support:

true

Online Content, Reports, Periodicals and Journals:

false

Professional and General Services:

true

Software as a Service (SaaS) and Cloud Software Applications:

false

Vehicles and Trailers:

false

Describe the product or service:

DEM is looking to upgrade our NICE Logger application and associated hardware. The NICE application and hardware records all the 911 calls for the City and County of San Francisco. This includes calls, radio and screen. It is a legal requirement for DEM.

Regulation 21.5(b): No Other Source:

true

Regulation 21.5(b): No Substitute:

false

Regulation 21.5(c): Perishable foods:

false

Regulation 21.5(d): Proprietary Articles Single Source:

false

Regulation 21.5(e): Pilot Project with a Term :

false

Regulation 21.5(f): Micro LBE Set :

false

Regulation 21.16(b): Reciprocal Agreements :

false

Regulation 21.16(c): Solicitations:

false

Regulation 21.30(d): Software Support:

false

Regulation 21.5(d): Proprietary Articles but More than One Source:

false

Cancel Notes:

OCA Admin

OCA Admin: Connie Dantes OCA Supervising Purchaser: Wilton Alderman

OCA Admin Decision: Reviewed and approved OCA Assistant Director: Jonathan Medwin

OCA Admin Comments:

For your review/approval.

OCA Supervising Purchaser

OCA Supervising Purchaser: Wilton Alderman Supervising Purchaser Decision: Rejected

Reason for Determination (Supervisor):

Please provide documentation from the supplier that they are the only available source for these commodities and services. This should be on their letterhead and clearly detail that no one else can perform said services or provide commodities. This info was requested on 6/6 but no response. Please resubmit when you have the requested documentation

SP Regulation 21.16(b): Reciprocal Agreements :

false

SP Regulation 21.16(c): Solicitations for Multiple Departments:

false

SP Regulation 21.30(d):

false

SP Regulation 21.5(b): No Other Source:

false

SP Regulation 21.5(b): No Substitute – Bid Required:

false

SP Regulation 21.5(b): No Substitute – No Bid Required:

false

SP Regulation 21.5(c): Perishable foods:

false

SP Regulation 21.5(d): Proprietary Articles – Bid Required:

false

SP Regulation 21.5(d): Proprietary Articles – No Bid Required:

false

SP Regulation 21.5(e): Pilot Project with a Term:

false

SP Regulation 21.5(f): Micro LBE Set Asides:

false

SP Prop 1:

false

SP Prop 2:

false

SP Prop 3:

false

SP Prop 4:

false

SP Prop 5:

false

SP Prop 6:

false

SP Prop 10:

false

SP Prop 12:

false

OCA Asst./Director

OCA Assistant Director: Jonathan Medwin

Asst./Director Decision:

Reason for Determination (Asst./Director):

DP Regulation 21.16(b): Reciprocal Agreements:

false

DP Regulation 21.16(c): Solicitations for Multiple Departments:

false

DP Regulation 21.30(d):

false

DP Regulation 21.5(b): No Other Source:

false

DP Regulation 21.5(b): No Substitute – Bid Required:

false

DP Regulation 21.5(b): No Substitute – No Bid Required:

false

DP Regulation 21.5(c): Perishable foods:

false

DP Regulation 21.5(d): Proprietary Articles – Bid Required:

false

DP Regulation 21.5(d): Proprietary Articles – No Bid Required:

false

DP Regulation 21.5(e): Pilot Project with a Term:

false

DP Regulation 21.5(f): Micro LBE Set Asides:

false

DP Prop 1:

false

DP Prop 2:

false

DP Prop 3:

false

DP Prop 4:

false

DP Prop 5:

false

DP Prop 6:

false

DP Prop 10:

false

DP Prop 12:

false

Regulation 21.5(b1)

Regulation 21.5(b) Question 1:

The NICE application and hardware records all the 911 calls for the City and County of San Francisco. This includes calls, radio and screen. It is a legal requirement for DEM.

Regulation 21.5(b) Question 2:

DEM has all their 911-related calls recorded in the NICE application, and the current version and hardware were sunsetted in December 2022. DEM needs to keep its history for over 3 years, and therefore we need to upgrade our application due to the fact that this current app and hardware are not supported anymore. We also have a requirement under the radio project to upgrade to the next version in order for the NICE system to be comparable with the radio system.

Regulation 21.5(b) Question 3:

DEM has been using NICE since 2018

Regulation 21.5(b) Question 4:

DEM has negotiated costs and support for nine (9) years -

Regulation 21.5(b) Question 5:

DEM has negotiated the costs over the last two (2) years

Regulation 21.5(b) Question 6:

N/A

Regulation 21.5(b2)

- Regulation 21.5(b) No Substitute Question 1:
- Regulation 21.5(b) No Substitute Question 2:
- Regulation 21.5(b) No Substitute Question 3:

Regulation 21.5(c)

- Regulation 21.5(c) Question 1:

Regulation 21.5(d)

- Regulation 21.5(d) Question 1:
- Regulation 21.5(d) Question 2:
- Regulation 21.5(d) Question 3:
- Usr Prop 1:
false
- Usr Prop 2:
false
- Usr Prop 3:
false
- Usr Prop 4:
false
- Usr Prop 5:
false
- Usr Prop 6:
false
- Usr Prop 10:
false
- Usr Prop 12:
false

Regulation 21.5(d2)

- Regulation 21.5(d2) Question 1:
- Regulation 21.5(d2) Question 2:
- Usrd2 Prop 1:
false
- Usrd2 Prop 2:
false
- Usrd2 Prop 3:
false
- Usrd2 Prop 4:
false
- Usrd2 Prop 5:
false
- Usrd2 Prop 6:
false

Usrd2 Prop 10:

false

Usrd2 Prop 12:

false

Regulation 21.5(e)

Regulation 21.5(e) Question 1:

Regulation 21.5(e) Question 2:

Regulation 21.5(e) Question 3:

Regulation 21.5(e) Question 4:

Regulation 21.5(e) Question 5:

Regulation 21.16(b)

Regulation 21.16(b) Question 1:

Regulation 21.16(b) Question 2:

Regulation 21.16(b) Question 3:

Regulation 21.16(b) Question 4:

Regulation 21.16(b) Question 5:

Regulation 21.16(b) Question 6:

Regulation 21.16(b) Question 7:

Regulation 21.16(b) Question 8:

Regulation 21.16(b) Question 9:

Regulation 21.16(c)

Regulation 21.16(c) Question 1:

Regulation 21.16(c) Question 2:

Regulation 21.16(c) Question 3:

Regulation 21.30

Regulation 2130 Revised Question 1:

Regulation 2130 Revised Question 2:

Regulation 2130 Revised Question 3:

Regulation 2130 Revised Question 4:

Regulation 2130 Revised Question 5:

New software not previously purchased:

false

Upgrade of previously purchased software:

false

Standard Support for previously purchased software:

false

Technical Services for previously purchased software:

false

Activities

Additional comments:

2023-06-21 15:38:15 - Juan Soto
(Additional comments)
Reply from: juan.soto@sfgov.org

Dear Wilton,

Apologies for the delay. Please see attached the requested supporting documentation.

Could you still approve the request?

Please advise.

Don't hesitate to contact me with any further questions or concerns.

Respectfully,

Juan

....

Juan R. Soto Romano

Radio Operations Program Manager

Department of Emergency Management
<<https://sf.gov/departments/department-emergency-management>>

O: 415.558.3822 | C: 415.940.0383

Juan.soto@sfgov.org<mailto:Juan.soto@sfgov.org>

"Dust settles... I don't."

Related List Title: Approval List
Table name: sysapproval_approver
Query Condition: Approval for = OCAWVR0007617
Sort Order: Approver in ascending order

1 Approvals

State	▲ Approver	Approving	Created	Comments
Approved	William Lee	OCA Waiver: OCAWVR0007617	2023-06-01 10:30:10	

Related List Title: OCA Waiver List
Table name: u_oca_waiver
Query Condition: Requested for = Juan Soto AND Active = true
Sort Order: Number in ascending order

4 OCA Waivers

▲ Number	Active	Activity due	Additional assignee list	Approval	Approval history	Assigned to	Assignment group	Business duration
14BPREDID0001638	true	UNKNOWN		Not Yet Requested				
OCAWVR0007617	true	UNKNOWN		Not Yet Requested				
OCAWVR0007724	true	UNKNOWN		Not Yet Requested				
OCAWVR0008038	true	UNKNOWN		Not Yet Requested				

Related List Title: Metric List
Table name: metric_instance
Query Condition: Table = u_oca_waiver AND ID = 0c8aa8a91b42e1d04cc655392a4bcb6e
Sort Order: None

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR -- MYR

Dept. Code: MYR

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

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

Type of Service: State Lobbying Services

Funding Source: General Fund

PSC Duration: 5 years 1 day

PSC Amount: \$2,000,000

1. Description of Work

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

To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.

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

State legislations and regulatory actions can be significant and profound impact on the budget of the City and the legal requirements used by City departments. Effective advocacy for the City in the states' capital is critical to advancing and securing the City's interests, particularly on state appropriation issues.

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.

Contractor has provided service in the past. PSC#40166-17/18

D. Will the contract(s) be renewed?

unknown at this time

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

The duration of the PSC is requested to align with mayoral terms. The RFP also supports a 5 year contract

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:

Work must be completed in Sacramento, CA.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Extensive experience successfully representing municipal agencies on state legislative and regulatory issues. They must demonstrate a deep understanding of budget, legislative, regulator, and political issues in state government, and must demonstrate a clear record of success advocating for clients. They must also demonstrate a clear understanding of San Francisco's needs for state representation. They must perform most of their duties in Sacramento, California.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
No.

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

Not applicable. Work must be completed in Sacramento.

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

- A. Explain why civil service classes are not applicable.
While civil service classes perform legislative and policy analysis, they do not have the breadth of knowledge, skills. Legislative/state government contacts and expertise are required to effectively advocate for the City's state legislative agenda. Additionally, the work performed is on an as-need basis in Sacramento, California, when action on legislation or regulation important to San Francisco are needed.
- 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. Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. No, the department will not receive training, this work is conducted in Sacramento as it utilizes relationships in the State Capitol
- 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 06/26/2023, 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: Daniella Mattias Phone: 415-554-6486 Email: daniella.mattias@sfgov.org

Address: 1 Dr. Carlton B. Goodlet Way Room 200 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40707 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of daniella.mattias@sfgov.org
Sent: Monday, June 26, 2023 9:09 PM
To: Mattias, Daniella (MYR); ewallace@ifpte21.org; Laxamana, Junko (DBI); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; l21pscreview@ifpte21.org; Mattias, Daniella (MYR); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40707 - 22/23

RECEIPT for Union Notification for PSC 40707 - 22/23 more than \$100k

The MAYOR -- MYR has submitted a request for a Personal Services Contract (PSC) 40707 - 22/23 for \$2,000,000 for Initial Request services for the period 11/01/2023 – 10/31/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/20809> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MAYOR

Dept. Code: MYR

Type of Request: Initial Modification of an existing PSC (PSC # 40166 - 17/18)

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

Type of Service: State Legislative Representation

Funding Source: General Fund

PSC Original Approved Amount: \$550,000 PSC Original Approved Duration: 11/01/17 - 10/31/19 (1 year 52 weeks)

PSC Mod#1 Amount: \$276,000 PSC Mod#1 Duration: 11/01/19-10/31/20 (1 year 1 day)

PSC Mod#2 Amount: \$276,000 PSC Mod#2 Duration: 11/01/20-12/31/21 (1 year 8 weeks)

PSC Mod#3 Amount: \$828,000 PSC Mod#3 Duration: 01/01/22-12/31/24 (3 years 1 day)

PSC Cumulative Amount Proposed: \$1,930,000 PSC Cumulative Duration Proposed: 7 years 8 weeks

1. Description of Work

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

To provide state legislative representation, to advocate on behalf of the City and Departments on legislative and regulatory matters, to assist with the implementation of the City's State Legislative Agenda, and to keep the Mayor's Office up-to-date with relevant information about State government activities. As a City and County, San Francisco is affected by a broad range of issues across many disciplines and departments. The City's state legislative representatives should possess the experience and knowledge to work in a broad array of policy topics included, but not limited to economic development, health care, public safety, human services, housing, environment, transportation, education and community development.

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

State legislation and regulatory actions have significant and profound impact on the budget of the City and the legal requirements used by City departments. Effective advocacy for the city in the nations' capital is critical to advancing and securing the City's interests, particularly on federal appropriation issues.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
yes PSC 40166-17/18

D. Will the contract(s) be renewed?

Unknown at this time

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

Ongoing needed lobbying service until the end of Mayoral term.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

B. Reason for the request for modification:

To add more duration and money until the end of the Mayor's term.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Extensive experience successfully representing municipal agencies on state legislative and regulatory issues. They must demonstrate a deep understanding of budget, legislative, regulator, and political issues in state government, and must demonstrate a clear record of success advocating for clients. They must also demonstrate a clear understanding of San Francisco's needs for state representation. They must perform most of their duties in Sacramento, California
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
While civil service classes perform legislative and policy analysis, they do not have the breadth of knowledge, skills. Legislative/state government contacts and expertise are required to effectively advocate for the City's state legislative agenda. Additionally, the work performed is on an as-need basis in Sacramento, California, when action on legislation or regulation important to San Francisco are needed.
- 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: Lobbying for the City covers a breadth of issues, which each issue taking priority at different times depending on current legislation. Outside firms have a pool of experts on staff available allowing them to tap into expertise as the need arises. They are in constant contact with state Legislator's office staff, allowing them to develop stronger relations with them. Being based in Sacramento, they are able to inform City staff in real time about issues that affect the City.

6. Additional Information

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

**7. Union Notification: On 02/28/22, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;**

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

Name: Daniella Mattias Phone: 415-554-6486 Email: daniella.mattias@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40166 - 17/18

DHR Analysis/Recommendation:

04/04/2022

Commission Approval Required

Approved by Civil Service Commission

04/04/2022 DHR Approved for 04/04/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Transportation Security Administration Explosive Detection Canine Training

Funding Source: Local Funds

PSC Duration: 5 years 2 days

PSC Amount: \$410,000

1. Description of Work

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

The consultant will provide required training to the San Francisco Municipal Transportation Agency (SFMTA) police service dogs (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards. The canines and police officers will then be qualified and TSA-certified to work when explosives detection is required within the SFMTA transit system.

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

The Department of Homeland Security-TSA requires annual certification for explosives detection of each of the SFMTA K-9 unit teams. Without the TSA certification, the team will not possess the required certification and will no longer be allowed to work in these types of critical or emergency situations.

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

The SFMTA used Contract 40189-19/20 for related and similar services. This service was provided by SFMTA.

D. Will the contract(s) be renewed?

Yes, the service is needed as long as SFMTA has a K-9 Unit.

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.

Invitation for Bid (IFB) is on a work for 3 years + 2 years extensions Contract.

2. Reason(s) for the Request

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

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

Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

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

B. Explain the qualifying circumstances:

The consultant will provide required training to the San Francisco Municipal Transportation Agency (SFMTA) police service dogs (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards. The canines and police officers will then be qualified and TSA-certified to work when explosives detection is required within the SFMTA transit system. This TSA certification training is provided when required and on an as-needed basis only. The Department of Homeland Security-TSA requires an annual certification for explosives detection of each of the SFMTA K-9 unit teams. Without the TSA certification, the team will not possess the required certification and will no longer be allowed to work in these types of critical or emergency situations.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Need to be TSA Certified to become a trainer.

B. Which, if any, civil service class(es) normally perform(s) this work? Q004, Police Officer 3;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, see attached scope of work and winning supplier will provide required insurances this is in a process of IFB.

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

This is under TSA Requirement for have knowledgeable K-9 Explosive Dog Trainer.

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

A. Explain why civil service classes are not applicable.

There is no civil service class position that currently requires the TSA certification to train canines and their handlers in explosives detection specialty.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. This TSA certification training is provided when required and on an as needed basis only.

6. Additional Information

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

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

Yes. Yes. TSA canine teams will conduct training and other canine activities within view of the public, thereby providing a noticeably visible deterrent towards terrorist threats and other criminal activity. The training is 9 hours of field training for each handler team and may extend the hours depending on the needs. Training includes proficiency training, obedience training, and explosives training.

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

Yes. To make sure our K-9 Explosive Dog and Handlers are up to dates on their training for the Safety of our City Workers and Public.

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

No.

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

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

7. Union Notification: On 07/21/2023, the Department notified the following employee organizations of this PSC/RFP request:
SFPOA - Q2-Q50

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41564 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Friday, July 21, 2023 11:39 AM
To: Nuque, Amy; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; Nuque, Amy; dhr-psccordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24

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

RECEIPT for Union Notification for PSC 41564 - 23/24 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 41564 - 23/24 for \$410,000 for Initial Request services for the period 09/04/2023 – 09/04/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrDrupal/node/21127> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Nuque, Amy

From: Nuque, Amy
Sent: Friday, July 21, 2023 12:06 PM
To: kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; najuwanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; Pete Wilson - Union 250A VP; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sflower.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; dhr-psccordinator@sfgov.org
Cc: sfdpoa@icloud.com
Subject: RE: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24
Attachments: 07-21-23 Union notification SFPOA - Q2-Q50.pdf

Hi All: Kindly discard the notification below because it was sent by error. I attached the corrected notification for Union SFPOA -Q2-Q50 (Transportation Security Administration Explosive Detection Canine Training)

I would like to apologize for any inconvenience caused.

Thank you,
Amy Nuque
SFMTA - PSC Coordinator

415-646-2802

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

From: dhr-psccoordinator@sfgov.org <dhr-psccoordinator@sfgov.org> On Behalf Of amy.nuque@sfmta.com

Sent: Thursday, July 20, 2023 3:52 PM

To: Nuque, Amy <Amy.Nuque@sfmta.com>; kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferlocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; Pete Wilson - Union 250A VP <pwilson@twusf.org>; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; Emanuel, Rachel (DEM) <rachel.emmanuel@sfgov.org>; laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sflower.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu <local200twu@sbcglobal.net>; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; Nuque, Amy <Amy.Nuque@sfmta.com>; dhr-psccoordinator@sfgov.org

Subject: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24

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RECEIPT for Union Notification for PSC 41564 - 23/24 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 41564 - 23/24 for \$410,000 for Initial Request

services for the period 09/04/2023 – 09/04/2028. Notification of 30 days

(60

days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/21127> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

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

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

Nuque, Amy

From: Nuque, Amy
Sent: Friday, July 21, 2023 11:56 AM
To: sfdpoa@icloud.com
Subject: FW: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24 (amended)

Hello:
Forwarding Union notification for PSC 41564 23/24
" Transportation Security Administration Explosive Detection Canine Training"

Thank you,
Amy N.

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

From: Nuque, Amy
Sent: Friday, July 21, 2023 11:48 AM
To: Chu, Vicky <Vicky.Chu@sfmta.com>
Cc: Nguyen, Trinh <Trinh.Nguyen@sfmta.com>; Lam, Gigi <Gigi.Lam@sfmta.com>
Subject: FW: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24 (amended)

Copy

Union review (SFPOA -Q2-Q50) 07/21/23
DHR 08/20/23
CSC Tentative 09/18/23

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

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of amy.nuque@sfmta.com
Sent: Friday, July 21, 2023 11:39 AM
To: Nuque, Amy <Amy.Nuque@sfmta.com>; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; Nuque, Amy <Amy.Nuque@sfmta.com>; dhr-psccordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 41564 - 23/24

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

RECEIPT for Union Notification for PSC 41564 - 23/24 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 41564 - 23/24 for \$410,000 for Initial Request services for the period 09/04/2023 – 09/04/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/21127> 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)

2023 SFPD/SFMTA K-9 Unit Scope of Work for TSA

Certified K-9 Trainer

Services to be provided by TSA certified K-9 trainer:

A. Provide K-9 detection training services for the SFPD/SFMTA K-9 Unit:

1. Provide weekly (more on an as needed basis) training to support the current five K-9 teams in the SFMTA K-9 unit.
2. Secure and set up training areas primarily on MTA properties within San Francisco.
3. Observe each individual K-9 team operating in each training area.
4. Provide results, feedback, critique, trouble shooting, and follow up recommendations to each K-9 team upon completion of the training area.
5. Input all individual K-9 team training records into the TSA Canine Website System (CWS) as per TSA K-9 program standards.
6. Meet any additional needs or requests from K-9 teams or K-9 Sergeant in charge. Examples: obedience, additional group training, additional individual training, participate in regional K-9 trainings with unit, training new /additional K-9 teams if unit expands, flexible days and hours, etc.

Trainer shall ensure that:

1. Weekly training will reflect and adhere to all TSA National Explosive Detection Canine Training Program (NEDCTP) guidelines and standards.
2. SFPD and SFMTA operating procedures will also be strictly adhered to.
3. Primary goal of unit trainer is to deliver the highest quality of K-9 training in order to best prepare each K-9 team to pass their annual certification in accordance with TSA K-9 program standards.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Transportation Security Administration Explosive Detection Canine Training

Funding Source: Federal Funds

PSC Duration: 5 years 2 days

PSC Amount: \$200,000

1. Description of Work

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

The consultant will provide required training to the San Francisco Municipal Transportation Agency (SFMTA) police service dogs (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards. The canines and police officers will then be qualified and TSA-certified to work when explosives detection is required within the SFMTA transit system.

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

The Department of Homeland Security-TSA requires annual certification for explosives detection of each of the SFMTA K-9 unit teams. Without the TSA certification, the team will not possess the required certification and will no longer be allowed to work in these types of critical or emergency situations.

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

The SFMTA used Contract 37826-15/16 for related and similar services. This service was provided by the police department in the past.

D. Will the contract(s) be renewed?

Yes, the service is needed as long as SFMTA has a K-9 unit.

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.

See attached Bid Proposal and Insurance Certif

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).
- Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

The consultant will provide required training to the San Francisco Municipal Transportation Agency (SFMTA) police service dogs (K-9 unit) and their handlers on explosives detection in accordance with Transportation Security Administration (TSA) standards. The canines and police officers will then be qualified and TSA-certified to work when explosives detection is required within the SFMTA transit system. This TSA certification training is provided when required and on an as-needed basis only. The Department of Homeland Security-TSA requires an annual certification for explosives detection of each of the SFMTA K-9 unit teams. Without the TSA certification, the team will not possess the required certification and will no longer be allowed to work in these types of critical or emergency situations.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The consultant must be a TSA-certified canine trainer with the explosives detection specialty. Must have five (5) years of experience training police service dogs in explosives detection in accordance with TSA standards.

B. Which, if any, civil service class(es) normally perform(s) this work? Q004, Police Officer 3;

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

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

The trainer must be TSA certified. No one within the City is TSA certified as a trainer.

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

- A. Explain why civil service classes are not applicable.
There is no civil service class position that currently requires the TSA certification to train canines and their handlers in the explosives detection specialty.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. This TSA certification training is provided when required and on an as-needed basis only.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. TSA canine teams will conduct training and other canine activities within view of the public, thereby providing a noticeably visible deterrent towards terrorist threats and other criminal activity. The training is 9 hours of field training for each handler team. Training includes proficiency training, obedience training, and explosives training.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 01/10/2020, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; SFPOA - Q2-Q50

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40189 - 19/20

DHR Analysis/Recommendation:

action date: 03/16/2020

Commission Approval Required

Approved by Civil Service Commission

03/16/2020 DHR Approved for 03/16/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- 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: Generator Maintenance Service on 3 Generators

Funding Source: 24970-298650-10000-10029985+0006-527990

PSC Duration: 5 years 2 days

PSC Amount: \$155,000

1. Description of Work

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

Annual maintenance and service of 3 generators PUC Power maintains on Treasure Island and Yerba Buena Island plus any spot repairs as needed. Service includes: Cooling system/Coolant; Air Intake system; Exhaust system; Electrical system; Fuel checks; Diesel Engine check; Engine Running check and Battery and Charge check.

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

These generators are the emergency back up power system for the islands. Also, with the extensive construction projects these generators provide power if a contractor needs to power down an area on the Island. Maintaining these generators is vital to the Islands power grid and need to be maintained and serviced to be ready. Denial of such service can result in power outages on Treasure Island to the people living there and to contractors doing work there. Generators also supply back up power to the US Coast Guard stationed on Yerba Buena Island.

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

Service has been provided only for repairs, when the generators break down. No service agreement has been used previously.

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.

We need annual service and testing for 5 years, which, if approved, will lock in pricing for that time, mitigating increasing costs of future services and testing.

2. Reason(s) for the Request

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

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

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

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

B. Explain the qualifying circumstances:

Service by a Service Provider/Vendor will make sure when there is a power outage on either Island that there is back up power; the generators were invaluable during the winter storms we had. We cannot have a situation where there is no back up and we need to service the generator, it would take too long. To accomplish this periodic servicing is important as well as rapid emergency response when needed. City lacks the experience of servicing generators and more importantly the Vendor will have access to proprietary parts needed for repairs since we bought the generators from the vendor.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Knowledge of power generators, electrical and mechanical systems, and diesel motor functions and repairs.

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: Service provider will have parts and equipment to service the generators as they should be a dealer to the Manufacturer of the generators. Service provider also should be authorized to work on these generators.

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

N/A

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

A. Explain why civil service classes are not applicable.

City service classes are specific to the Enterprise or Dept. and does not cover all the areas of expertise needed. Classes are specific to MTA, Water, or Wastewater and not for equipment needed for power generation.

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. PUC Power operates 3 large generators rated at 1000kv. Experience in servicing mechanical and electrical systems as well as load testing of generators is necessary to perform the services and tests. No mechanical classification includes duties such as those. Experienced mechanics provided by a vendor can service and test the generators, so they are able to power up at a moment's notice.

6. Additional Information

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

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

No. No training can be done. All job classifications in our Dept. do not cover mechanical duties and service of generators. Many of the scope of service tasks are beyond the skills of our workers and outside of the duties covered in their union job description.

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

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

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

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

7. **Union Notification:** On 08/04/2023, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41489 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfgwater.org
Sent: Friday, August 4, 2023 8:53 AM
To: Hale, Shawndrea (PUC); jduritz@uapd.com; kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; camaguey@sfmea.com (contact); camaguey@sfmea.com (contact); cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; Stan Eichenberger; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; Najuawanda Daniels; Pierre King - UAPD; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marenco; pwilson@twusf.org; cmoyer@nccrc.org; Frigault, Noah (HRC); sfdpoa@icloud.com; mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; Laxamana, Junko (DBI); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; Tracy McCray; mleach; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; Stan Eichenberger; Jason Klumb; camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sfgwater.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy Frigillana; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; David Canham; jtanner940@aol.com; Osha Ashworth; l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; Hale, Shawndrea (PUC); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100k PSC # 41489 - 23/24

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

RECEIPT for Union Notification for PSC 41489 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 41489 - 23/24 for \$155,000 for Initial Request services for the period 09/01/2023 – 09/01/2028. Notification of 30 days (60 days for SEIU) is required.

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

https://url.avanan.click/v2/___http://apps.sfgov.org/dhrdrupal/node/21208___YXAzOnNmZHQyOmE6bzo0MDIjYzA2ZGQxNGY3MWQxYzMOZDFhZGY0YWU1ZWJmND02OmEzNzY6ZmQyZWVhYzI3MDEyZDVhYTViYTViZDg0MjgwNmQ1NjE5YmQxYzVIMzk0MDhiNGNmZjhhMGE4YmRiYmM5Yjk4NTpwOIQ For union notification, please see the TO: field of the email

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: MAINTENANCE, INSPECTION, CALIBRATION AND REPAIR OF ELECTRICAL EQUIPMENT AND INSTRUMENTATION AN

Funding Source: WWE Operating Budget

PSC Duration: 5 years 1 day

PSC Amount: \$1,000,000

1. Description of Work

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

The purpose of this contract is to provide maintenance, calibration and repair services, and certification of the truck and hopper scales throughout the Wastewater Enterprise (WWE) for the City and County of San Francisco, Public Utilities Commission (SFPU). Work under this contract may include maintenance and repair to the load cells, load stands, indicators, microcells, junction boxes, ticket printers and troubleshooting truck and hopper scale software programs. Work will also include load scale testing and calibration using contractor's certified test weights, test trailer and test truck.

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

WWE truck and hopper scales are critical for regulatory purposes in weighing our cake/biosolids for land application and agriculture and for determining biosolids hauling cost and for weighing our grit and screenings produced from the wastewater treatment plant. The contractor is required to be registered and the technicians licensed with the California Dept of Food and Agriculture, Division of Measurement Standards to ensure the accuracy of the scales. The scales are critical to determine the weight of the trucks in compliance with California Vehicle Code, mandated by Caltrans. Consequences of denial will result in violation of the requirements set forth by the California Dept of Food and Agriculture, Division of Measurement Standards and the California Vehicle Code. The San Francisco Department of Public Health, Weights and Measures Program also monitors the accuracy of scales.

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

Yes, this service has been provided in the past through OCA approved contracts, via ITSF17000118/CD, ITSF11000273/CD and 1000020092 for the last 10 years.

D. Will the contract(s) be renewed?

yes

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

The duration for this five-year contract is being requested in order to provide continued maintenance, calibration and repair services, and certification of the truck and hopper scales throughout Wastewater Enterprise (WWE) facilities.

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).
- Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

Maintenance and calibration services are required to be performed once a year on WWE's truck scales. Repair services will be required on an as-needed basis. The maintenance, calibration and as-needed repair services require a requisite amount of expertise and knowledge to maintain the truck and hopper scales, the scale software programs and require specialized equipment. In order to perform the work, technicians must have special licensing and the firm registered with the Department of Food and Agriculture, Division of Measurement Standards.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Service technicians shall be registered and licensed service agents by the Department of Food and Agriculture, Division of Measurement Standards. Service technicians are required to have the skills and experience to perform maintenance, calibration and repair services on truck and hopper scales and their components, i.e., load cells, load stands, indicators, microcells, junction boxes. Service technicians must have the knowledge and experience to troubleshoot the truck and hopper scale indicator software programs. The service technicians shall also have the expertise in performing load scale testing and calibration. This work is highly specialized that requires specific knowledge, special tools and license by the enforcement agency.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor must provide certified test weights, test trailer and test truck to perform load scale testing, maintenance and calibration.

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

N/A

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

- A. Explain why civil service classes are not applicable.
Our civil service staff does not have the expertise, knowledge and specialized equipment to perform the truck and hopper scale work. Our civil service staff would also have to get special licensing and registration with the California Dept of Food and Agriculture, Division of Measurement Standards to perform the work.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. The civil service staff cannot perform the work because the work is specialized, requires specialized equipment, and certified technicians.

6. Additional Information

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

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. The contractor will not train City employees as there is no intention for this service to be performed by City employees. City employees would have to get special licensing and registration with California Dept of Food and Agriculture, Division of Measurement Standards and specialized training, and the City would have to purchase specialized equipment to perform the work.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 07/20/2023, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49028 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

From: dhr-psccoordinator@sfgov.org on behalf of shale@sfgwater.org
To: [Hale, Shawndrea M.](mailto:Hale, Shawndrea M.;); kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DFM\);](mailto:Emanuel, Rachel (DFM);) laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@bt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Basconcillo, Kathy; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale, Shawndrea M.;); dhr-psccoordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 49028 - 23/24
Date: Thursday, July 20, 2023 11:18:37 AM

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

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

RECEIPT for Union Notification for PSC 49028 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 49028 - 23/24 for \$1,000,000 for Initial Request services for the period 02/01/2024 – 01/31/2029. 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/21119> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

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

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

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

Type of Service: Construction Project Management System Implementation

Funding Source: Public Works Overhead Fund (13290)

PSC Amount: \$500,000 PSC Est. Start Date: 08/28/2023 PSC Est. End Date 08/28/2028

1. Description of Work

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

Public Works is implementing a construction project management system software solution to integrate various systems related to project delivery processes and enhance financial management capabilities. The selected vendor will be responsible for the implementation and ongoing support of the System, ensuring its successful integration with existing systems while providing functional and technical assistance as needed. These services will be used to assist the Departments with system enhancements, modifications and additional systems support.

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

This service is necessary for Public Works to ensure that Public Works can optimize project delivery processes and procurement practices, improve financial management, promote data integration and accessibility that will help streamline operations and meet reporting requirements. Denial of these services would hinder project delivery and procurement, impede financial management and prevent the department benefits from system enhancements, modifications and additional system supports to meet evolving business needs effectively.

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

Prior Civil Service Commission approval for similar services have been granted for Public Works under PSC 49277-21/22 approved February 07, 2022 and Controller's Office under PSC 43296-18/19 approved on April 29, 2021.

D. Will the contract(s) be renewed?

If needed, the contract resulting from this solicitation have options to extend 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.

PSC duration is 5 years to account for time needed to negotiate and award contract. The contract will have an initial duration of less than 5 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 require high level of expertise in PeopleSoft and related systems. They require specialized knowledge and are typically short-term engagements.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Requires expert level functional and technical knowledge in system integration, implementation of similar systems like Oracle PeopleSoft systems, Oracle Business Intelligence, and related City legacy systems. Experience may also include public sector implementations in the construction and capital project management domain, provide training and knowledge transfer services related to the systems.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal; 1070, IS Project Director; 1657, Accountant IV; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 1825, Prnpl Admin Analyst II; 0932, Manager IV; 0933, Manager V;
- 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?

Public Works does not have resources available with the necessary product expertise and to provide the services required for this engagement.

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

- A. Explain why civil service classes are not applicable.
These services require high level of expertise in PeopleSoft and related systems. They require specialized knowledge and are typically short-term engagements. At the conclusion of the service period, knowledge transfer is typically conducted to empower City staff to assume responsibility for delivering these services independently in the future.
- 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 work is short-term and highly specialized 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 contact? If so, please explain what that will entail; if not, explain why not.
No. No training is required. There will be knowledge transfer so staff have a better understanding of the implementation and system integration of the Oracle PeopleSoft and Kahua Project Construction Management systems.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. **Union Notification:** On 07/11/2023, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 49 South Van Ness Ave, Suite 1600 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48886 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
To: [Burns, Alexander \(DPW\)](mailto:Burns,Alexander@DPW); kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; andrea@sfmea.com; [Laxamana, Junko \(DBI\)](mailto:Laxamana,Junko@DBI); Criss@sfmea.com; christina@sfmea.com; staff@sfmea.com; [Macaranas, Belle \(DPW\)](mailto:Macaranas,Belle@DPW); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator,DHR@HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 48886 - 23/24
Date: Tuesday, July 11, 2023 11:50:29 AM

RECEIPT for Union Notification for PSC 48886 - 23/24 more than \$100k

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a request for a Personal Services Contract (PSC) 48886 - 23/24 for \$500,000 for Initial Request services for the period 08/28/2023 – 08/28/2028. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/21077> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

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

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

Type of Service: Project and Construction Management

Funding Source: PW Overhead Fund

PSC Duration: 8 years 1 day

PSC Amount: \$4,500,000

1. Description of Work

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

The contract targets licensing/subscription and delivery of configured off-the-shelf software to support Construction and Capital Project Management activities within Public Works, including interactions with construction contractors. The work includes meetings and project management activities to agree upon and deliver the configured and functional solution. The contract also sees as needed customization and integration support to fill gaps in off-the-shelf functionality or integration with related systems. Depending on the subscription or licensing and hosting model, the contract may also include hosting services.

Estimated costs for software subscription and module fees are approximately \$3.3 million over eight years. The remaining \$1.2 million are estimated for implementation and as needed support services with over 70% estimated for the initial phase and major component rollouts in the first two years.

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

The department does not have an existing system and these implementation services and the related software are necessary to support our operations, reporting needs of our and other departments, and collaboration with the contractors that work on the City's street and building portfolios. Denial of this item would result in unnecessary administrative costs and risks around our portfolio's project and construction management and remove an opportunity for savings due to potential reduction in errors and delays.

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

Yes, initial and same scope of service approved under PSC 48731-18/19

D. Will the contract(s) be renewed?

Yes, should there be a need to continue services.

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

While the implementation/configuration includes working with City staff, training, and handoff to IT staff, some occasional services may be needed for the selected product in order to support upgrades, escalation of defects, integration, or customization. Beyond that, the licensing and subscription options vary by vendor, but would be ongoing until another system is acquired or built. As this is a major system impacting hundreds of staff and construction contractors, and it has a multi-year roadmap, it is common to have a term beyond 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:

In the short term, the department needs experienced resources to lead implementation of the vendor's software. Beyond that and given the lifecycle of software products and that multiple products support the Capital Project domain: Occasional upgrade support may be needed for the specialized software. Regular decisions and upgrades or patches for other products (from Peoplesoft to other systems) may require additional work to occur in the selected tool and need expertise or changes. Resource availability may be a problem given the specialized nature of our needs as we support our own and other department capital projects as well as more operational work.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The selected contractor will need to have experience in the selected product, implementation of the selected product, and experience with public sector implementations in the construction and capital project management domain.

B. Which, if any, civil service class(es) normally perform(s) this work? 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1061, IS Program Analyst-Assistant; 1062, IS Programmer Analyst; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 1070, IS Project Director; 1824, Pr Administrative Analyst;

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

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

Public Works does not have resources available with the necessary product expertise and has not been able to obtain them through other departments or the hiring process.

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

A. Explain why civil service classes are not applicable.

We are not aware of any City civil service staff that have the product and domain expertise needed to provide the services required for this engagement.

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. The majority of consulting costs are expected in year one and two, supporting the initial configuration and rollout and phased rollout of additional modules in the second year, the 105X and 104X series are appropriate for continued enhancements to the system, with some escalation and outside support for upgrades and integrating additional systems or products on our roadmap.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not. Yes. Approximately four employees will receive train-the-trainer training on the software. (4 hours) Contractor will produce training documentation for all users of the system (~500) which span architect, engineering, construction, inspector, and analyst, roles. (2 hours) Contractor will provide admin training (16+ hours) and hand-off support to 2-3 IT staff.

- 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 11/29/2021, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 49 South Van Ness, Suite 1600 San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49277 - 21/22

DHR Analysis/Recommendation:

action date: 02/07/2022

Commission Approval Required

Approved by Civil Service Commission

02/07/2022 DHR Approved for 02/07/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CONTROLLERDept. Code: CONType of Request: Initial Modification of an existing PSC (PSC # 43296 - 18/19)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Enterprise Resource Planning Systems Implementation & Support ServicesFunding Source: General & Non General FundPSC Original Approved Amount: \$7,000,000PSC Original Approved Duration: 03/06/19 - 12/31/23 (4 years 43 weeks)PSC Mod#1 Amount: \$3,499,000PSC Mod#1 Duration: 04/21/21-03/31/26 (2 years 12 weeks)PSC Cumulative Amount Proposed: \$10,499,000PSC Cumulative Duration Proposed: 7 years 3 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The City seeks responses from Respondents demonstrating successful functional, technical, and/or project management experience with Oracle PeopleSoft (Financials and Supply Chain Management (FSCM), Human Capital Management (HCM), Enterprise Learning Management (ELM), Oracle Business Intelligence Applications (OBIA), Oracle Business Intelligence Enterprise Edition (OBIEE)), and City legacy and related systems. These services will be used to assist the Controller's Office and other City Departments with system enhancements, modifications and additional systems support.

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

These services are critical to ensuring that Citywide systems (SF Financials, SF Procurement, SF People & Pay, SF Learning, SF Reports and Analytics and SF Budget) are available for over 6,000 city users and the entire City supplier community. The services will also help provide critical upgrades, enhancements and new functionality, on PeopleSoft and legacy systems that will support the effective operation of City departments. Denial could result in critical functionality not being available to support City departments.

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

Yes PSC 41711-1.17

D. Will the contract(s) be renewed?

If needed, contracts resulting from this solicitation may be extended.

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 Controller's Office requests that the PSC cover about 6.25 years since many contracts have options to renew. With consultants, there is a significant learning curve for their understanding and documenting of City and County of San Francisco (City) systems and requirements. The options to renew the contract will also allow the City to address new security and system requirements.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The City seeks responses from Respondents demonstrating successful functional, technical, and/or project management experience with Oracle PeopleSoft (Financials and Supply Chain Management (FSCM), Human Capital Management (HCM), Enterprise Learning Management (ELM), Oracle Business Intelligence Applications (OBIA), Oracle Business Intelligence Enterprise Edition (OBIEE)), and City legacy and related systems. These services will be used to assist the Controller's Office and other City Departments with system enhancements, modifications and additional systems support. Services require expert level knowledge of PeopleSoft and related systems. Services are highly specialized and short term in nature. Knowledge transfer at the end of services provided generally occur so that City staff are able to provide these services going forward.

B. Reason for the request for modification:

Modification is needed to extend the PSC by 2.25 years to 3/31/2026 and to increase the PSC amount by \$3,499,000 for consultant services that are critical to ensuring Citywide systems (SF Financials, SF Procurement, SF People & Pay, SF Learning, SF Reports and Analytics and SF Budget) are up to date related to system requirements and security. The services are needed for critical upgrades, enhancements and new functionality. Cumulative time and amount increase is less than 50% of original PSC.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Requires expert level functional and technical knowledge of Oracle PeopleSoft systems, Oracle Business Intelligence, and related City legacy systems. Experience may also include training and knowledge transfer services related to the systems.

B. Which, if any, civil service class(es) normally perform(s) this work? 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal; 1070, IS Project Director; 1657, Accountant IV; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 1825, Prnpl Admin Analyst II; 0931, Manager III; 0932, Manager IV; 0933, Manager V;

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.

Services require expert level knowledge of PeopleSoft and related systems. They are highly specialized and short term in nature. Knowledge transfer at the end of services provided generally occur so that City staff are able to provide these services going forward.

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 work is short-term and highly specialized 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 contact? If so, please explain what that will entail; if not, explain why not.
Knowledge transfer and training will occur as a part of all contracts that result from the solicitation. Employees will generally be in the 1054, 1053 and 1064 job classes.

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.
Work done by existing contractor and possible new contractors

7. Union Notification: On 04/21/21, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association;

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: 1 Carlton B. Goodlett Place, #306, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43296 - 18/19

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 04/29/2021

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN

Dept. Code: ADM

Type of Request: Initial Modification of an existing PSC (PSC # 43644 - 22/23)

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

Type of Service: Development of Digital Workflow System

Funding Source: Work orders from departments

PSC Original Approved Amount: \$250,000 PSC Original Approved Duration: 05/01/23 - 04/30/25 (2 years)

PSC Mod#1 Amount: \$750,000 PSC Mod#1 Duration: 07/25/23-04/30/26 (1 year)

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

1. Description of Work

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

The Permit Center seeks professional services to implement a streamlined and digital workflow solution, including data collecting and sharing. The professional services will configure and implement an inspection scheduler and workflow tool to digitize, streamline, and automate the inspection processes involving multiple inspecting departments. The tool will allow customers to schedule on-site inspections and collect data from the applicant prior to arrival. The workflow tool also allows multiple departments to access and view the data, make updates to the data prior to inspection, and allows departments to collect and record new data during the mobile inspection process. The services will provide a technology solution that provides an integrated and complete digital workflow. The solution will also be scalable to other use cases across multiple permitting and inspection services across the Permit Center.

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

Current workflows rely on manual scheduling and data collection. Duplicate data is often captured and recorded on disparate systems that are unable to share data across multiple platforms. Current technology products used by departments are not scalable and lack the ability to integrate data across the entire workflow. Technical expertise is needed for a new technology product that streamlines a digital workflow across disparate data systems.

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.

By contract

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The vendor will set up the system using specialized skills.

B. Reason for the request for modification:

Additional work is necessary.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Consulting expertise in digital workflow technology solutions and products. Ability to configure a technology solution to meet City use case requirements expertise is required, including a certified salesforce administrator to configure the application to current workflows, a Mulesoft Certified Developer to write and maintain integrations with existing data platforms and systems.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
Technical resources with subject matter expertise do not exist in the City. There are no resources with the necessary certification and training available for this 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: This engagement is a one-time project. The Permit Center is a working to hire a position that could fill the technical needs for salesforce configuration and integration.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Knowledge transfer for maintenance to technical resources will occur. Continued maintenance of software package will be performed by Permit Center staff.
- 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.
Additional work is necessary

**7. Union Notification: On 07/25/23, 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: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place Room 362, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43644 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org
To: [Lubamersky, Joan \(ADM\); kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; eworkwallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; DHR-PSCCoordinator, DHR \(HRD\)@ifpte21.org](mailto:Lubamersky, Joan (ADM); kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; eworkwallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)
Subject: Receipt of Modification Request to PSC # 43644 - 22/23 - MODIFICATIONS
Date: Tuesday, July 25, 2023 1:54:25 PM

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a modification request for a Personal Services Contract (PSC) for \$750,000 for services for the period July 25, 2023 – April 30, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/21147>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

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

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

Type of Service: Development of Digital Workflow System

Funding Source: Work orders from departments

PSC Duration: 2 years

PSC Amount: \$250,000

1. Description of Work

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

The Permit Center seeks professional services to implement a streamlined and digital workflow solution, including data collecting and sharing. The professional services will configure and implement an inspection scheduler and workflow tool to digitize, streamline, and automate the inspection processes involving multiple inspecting departments. The tool will allow customers to schedule on-site inspections and collect data from the applicant prior to arrival. The workflow tool also allows multiple departments to access and view the data, make updates to the data prior to inspection, and allows departments to collect and record new data during the mobile inspection process. The services will provide a technology solution that provides an integrated and complete digital workflow. The solution will also be scalable to other use cases across multiple permitting and inspection services across the Permit Center.

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

Current workflows rely on manual scheduling and data collection. Duplicate data is often captured and recorded on disparate systems that are unable to share data across multiple platforms. Current technology products used by departments are not scalable and lack the ability to integrate data across the entire workflow. Technical expertise is needed for a new technology product that streamlines a digital workflow across disparate data systems.

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

These services have not been provided in the past. Departments rely on single channel technology products or rely on custom built solutions that are not scalable. Data integrations are either not technologically feasible or are too costly to scale to other use cases. Solutions for each portion of the workflow exist, but current solutions do not integrate and share data across the workflow journey. Products are siloed across the entire workflow and require manual transfer of data.

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 vendor will set up the system using specialized skills.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Consulting expertise in digital workflow technology solutions and products. Ability to configure a technology solution to meet City use case requirements expertise is required, including a certified salesforce administrator to configure the application to current workflows, a Mulesoft Certified Developer to write and maintain integrations with existing data platforms and systems.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1044, IS Engineer-Principal; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Technical resources with subject matter expertise do not exist in the City. There are no resources with the necessary certification and training available for this work.

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

- A. Explain why civil service classes are not applicable.
Technical resources with subject matter expertise do not exist in the City. There are no resources with the necessary certification and training available for this 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. This engagement is a one-time project. The Permit Center is a working to hire a position that could fill the technical needs for salesforce configuration and integration.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. Knowledge transfer for maintenance to technical resources will occur. Continued maintenance of software package will be performed by Permit Center staff.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.

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

7. **Union Notification:** On 02/20/2023, 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: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place Room 362 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43644 - 22/23

DHR Analysis/Recommendation:

action date: 04/17/2023

Commission Approval Required

Approved by Civil Service Commission

04/17/2023 DHR Approved for 04/17/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ETHICS COMMISSION

Dept. Code: ETH

Type of Request: Initial Modification of an existing PSC (PSC # 40949 - 16/17)

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

Type of Service: Electronic Filing System

Funding Source: General Fund

PSC Original Approved Amount: \$1,374,750 PSC Original Approved Duration: 05/10/17 - 06/30/20 (3 years 7 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/20-06/30/22 (2 years)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/22-06/30/24 (2 years 1 day)

PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 07/01/24-06/30/26 (2 years)

PSC Cumulative Amount Proposed: \$1,374,750 PSC Cumulative Duration Proposed: 9 years 7 weeks

1. Description of Work

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

The Ethics Commission currently contracts with a private vendor to provide an electronic filing system to file ethics forms and maintain its filing records databases. The forms include Fair Political Practices Commission (FPPC) and local campaign finance forms, Statement of Economic Interests, lobbyist reports and campaign consultant reports. The Secretary of State's approval is required for filing systems that submit electronic FPPC campaign finance forms and the Ethics Commission can only contract with vendors on the Secretary of State's certified vendor list. The FPPC's approval is required for filing systems that submit electronic Statement of Economic Interest filings. The Ethics Commission requires a service that includes web-based filing software for filers, a back-office administration system, a database, and a search engine for online public disclosure. This system must be hosted by the vendor's server infrastructure.

This personal services contract will include developing additional components for the Ethics Commission's existing electronic filing system, technical support, and system maintenance. The new components include new reporting requirements for Expenditure Lobbyists as required by Measure C (adopted by San Francisco voters in the November 3, 2015 election), new electronic forms required by the Committee on Information Technology (COIT)-funded Efiling Conversion Project, and new lobbyist registration requirements included in Measure T (adopted by San Francisco voters in the November 8, 2016 election). On January 20, 2017, the Mayor signed into law an ordinance requiring the electronic filing of behested payment reports by City boards and commissions, which becomes operative on January 1, 2018. The new contract will also provide flexibility to add additional forms and functionality to the system when new legislation is passed during the contract term.

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

The Ethics Commission is required by state and local law to provide an electronic filing system. See San Francisco Campaign and Governmental Conduct Code § 1.112, California Government §§ 84600 et seq, FPPC Regulation 18756(c), and Ethics Commission Regulation 2.140(a)1. The Ethics Commission currently offers an electronic filing system to comply with these laws and regulations by contracting with the only agency vendor solution in the state that produces an electronic filing and management system that is currently certified by the Secretary of State. This system is used by over 88 other local California jurisdictions. By working with other California jurisdictions with similar or the same ethics filing requirements, the Commission significantly reduces the cost of providing electronic filing and management systems by using the same software statewide. Voters provided funding through the Expenditure Lobbyist program (Measure C) and the new Lobbyist registration requirements (Measure T) with the specific intent that the Ethics Commission establish an electronic filing system that complies with the law. The Ethics Commission must also comply with COIT project requirements to add several electronic forms to the existing Statement of Economic Interests (SEI Form 700) system and to expand the electronic filing of SEI Form 700 to more than 3,500 designated filers at the department level. In addition, recently passed legislation (Ordinance #160478) proposes that the Ethics Commission produce an electronic filing system to allow members of boards and commissions to electronically file behested

payment reports, which becomes operative on January 1, 2018. Failure to provide these services will, in some cases, require forms to be filed on paper, which is contrary to what the law will require.

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.

40949-16/17

D. Will the contract(s) be renewed?

Yes, the contract will need to be renewed in the future to be in compliance with state and local law.

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:

We are exercising a clause within our current contract to extend the term for two more years to continue maintenance and support service. This will be the third time we will have extended this contract.

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:

DT has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

B. Reason for the request for modification:

We are exercising a clause within our current contract to extend the term for two more years to continue maintenance and support service. This will be the third time we will have extended this contract.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Requires knowledge of the Commission's existing electronic filing system, local and state campaign finance, lobbyist and financial disclosure laws and regulations, local campaign consultant regulations, and Secretary of State and FPPC regulations and data requirements. Programmers, database administrators and server technicians would be needed for the City to independently create an electronic filing system service to match the capabilities of a private service provider. Support technicians would be needed to provide support during business and after hours.

B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The vendor will use a server infrastructure that the Ethics Commission does not have the resources to reproduce as well as off-site backup facilities. The server infrastructure must be able to handle high volumes of traffic during filing deadlines. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

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 Department of Telecommunications has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The Ethics Commission believes a new civil service class would be unnecessary for this project.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The vendor will provide initial staff training on how to use and support the system. The Ethics Commission does not expect to receive more than 5 hours of training. After receiving training, the Ethics Commission staff will train filers how to use the system. The Ethics staff will receive training from the vendor, including clerks and administrative analysts.

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

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

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
Yes. See Commission minutes 4.22.13

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Yes, contracted with Netfile, Inc. since 2007

7. Union Notification: On 08/09/23, 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: Jarrod Flores Phone: 415-235-7991 Email: jarrod.flores@sfgov.org

Address: 25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40949 - 16/17

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Flores, Jarrod (ETH)

From: dhr-psccordinator@sfgov.org on behalf of gayathri.thaikkendiyil@sfgov.org
Sent: Wednesday, August 9, 2023 1:33 PM
To: Thaikkendiyil, Gayathri (ETH); Laxamana, Junko (DBI); kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; Flores, Jarrod (ETH); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 40949 - 16/17 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The ETHICS COMMISSION -- ETH has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1, 2024 – June 30, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/14372>

Email sent to the following addresses: L21PSCReview@ifpte21.org amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ewallace@ifpte21.org agarza@ifpte21.org mweirick@ifpte21.org jharding@ifpte21.org kdavis@ifpte21.org junko.laxamana@sfgov.org

Additional Attachment(s)



**City and County of San Francisco
Ethics Commission**

25 Van Ness Avenue, STE 220
San Francisco, CA 94102-6053
ethics.commission@sfgov.org
415-252-3100 | sfethics.org

Minutes – April 22, 2013

Posted on May 23, 2013

Minutes of the Regular Meeting of The San Francisco Ethics Commission April 22, 2013 Room 400, City Hall 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102

I. Call to order and roll call.

Chairperson Hayon called the meeting to order at 5:30 PM. Chairperson Hayon stated that Commissioner Studley was excused. She also noted that Commissioner Liu had resigned and her replacement has yet to be assigned.

COMMISSION MEMBERS PRESENT: Beverly Hayon, Chairperson; Paul A. Renne, Commissioner; Benedict Y. Hur, Commissioner. Commissioner Studley was excused.

STAFF PRESENT: John St. Croix, Executive Director; Mabel Ng, Deputy Executive Director; Steven Massey, Information Technology Officer; Catherine Argumedo, Investigator/Legal Analyst.

OFFICE OF THE CITY ATTORNEY: Josh White, Deputy City Attorney (DCA).

OTHERS PRESENT: Jonathan Pearlman, Historic Preservation Commissioner; Nicole Wheaton, Director of Appointments, Office of the Mayor; David Pilpel; and other unidentified members of the public.

MATERIALS DISTRIBUTED:

- Staff Memorandum re: Request for Waiver from member of Historical Preservation Commission, dated April 15, 2013;
- Waiver request from Mr. Pearlman, dated April 2, 2013;
- Letter from Mayor Ed Lee re: San Francisco Campaign and Governmental Conduct Code, Section 3.224 – Prohibition on Representing Private Parties Before Other City Officers and Employees – Compensated Advocacy, dated April 8, 2013 and supporting document;
- Staff Memorandum re: Regulation re: CFRO Section 1.112 and draft regulations, dated March 20, 2013;
- Staff Memorandum re: Contracting for the Electronic Filing System, dated April 12, 2013;
- Draft minutes of the Commission’s special meeting of April 1, 2013;
- Executive Director’s Report.

II. Public comment on matters appearing or not appearing on the agenda that are within the jurisdiction of the Ethics Commission.

None.

III. Discussion and possible action a request from Jonathan Pearlman and Mayor Lee for a waiver from Campaign and Governmental Conduct Code section 3.224 (compensated advocacy ban) on behalf of Mr. Pearlman, a licensed architect who occupies Seat 3, the architectural historian seat, on the Historic Preservation Commission (HPC), so that Mr. Pearlman may represent private parties before other City officers and employees while he serves on the HPC.

Jonathan Pearlman, HPC Commissioner, stated that he is a practicing architect in San Francisco. He stated that he is serving on the HPC and is quite honored that Mayor Lee appointed him and that the Board supported the appointment. He stated that he cares about San Francisco and its historic buildings. He stated that he has practiced for about 19 years and continues to work on projects throughout the City. He stated that about 70% of his business is within the City – part of his work is presenting plans to the Planning Department or continuing to work with staff of the Planning Department or the Department of Building

Inspection. He stated that the firm had about seven people in the 2000s, but now only has about four. He stated that, for the most part, he and his staff do not appear before any commission or board, as most issues are handled administratively. He stated that he has one project that is up for consideration before a commission, which is the Alexandria Theatre project. He stated that he has been solely responsible for that project and there is a hearing scheduled later on that week. He stated that no one else at his firm may present the issues on behalf of his client. He stated that, in the future, he expects to have more staff so that they would be able to present a project before a board or commission. He requested a waiver so that he may continue his livelihood and be able to continue serving on the HPC.

Commissioner Hur asked what Mr. Pearlman would do if he were not granted the waiver. Mr. Pearlman stated that he would probably not serve on the HPC because of the possible potential conflicts in the future. He stated that he would recuse himself, if any matter he had worked on came before the HPC. He stated again that he did not expect many, if any, projects to be heard by a board or commission. He stated that the waiver related to work he would need to do with staff.

Chairperson Hayon asked him about the requirements for Seat 3 on HPC. Mr. Pearlman stated that there are historians that do not work in the field and there are architects who work in the field, but are not historians. Commissioner Renne asked whether any other person who sat in Seat 3 on HPC had sought a waiver. Mr. Pearlman stated that, since HPC was relatively new, there has only been one other person in the Seat. He stated that that individual did not seek a waiver because he worked at a large firm and never presented anything before a board or commission. He also stated that there may not have been that many projects that the former Commissioner's firm had in the City.

Commissioner Renne reminded Mr. Pearlman that he would not use his position to bring any kind of influence on the decisions made on behalf of his or his client's projects. Mr. Pearlman stated that he would be extremely sensitive to that and would find other individuals in his firm who would present before the board or commission. He stated that he would do everything he could to avoid any appearance of taking advantage of his position.

Nicole Wheaton, Director of Appointments for the Mayor's Office, stated that Mr. Pearlman's appointment was unanimously approved by the Board about a month ago. Commissioner Hur asked for the number of candidates. She stated that outreach for the position began at the end of last year and there was a 60-day

window from January 1. She stated that the Mayor's Office reviewed between 25-30 candidates and narrowed it to three serious candidates. She stated that the waiver issue was discussed with Mr. Pearlman and would not have been necessary for the other two candidates.

Commissioner Hur asked what distinguished Mr. Pearlman from the other candidates. Ms. Wheaton stated that all of the candidates were fantastic, but what they liked about Mr. Pearlman was that he met all of the qualifications and his philosophy matched what the Mayor wanted to see. She stated that he was a small-business owner and that they were looking for someone with a pragmatic approach to historic preservation. She stated that he has experience in the City working on projects in the City and he has worked on smaller projects with residents and has first-hand experience with preservation. She stated that his approach towards preservation benefits the community now and into the future.

Motion 13-04-22-1 (Renne): Moved, but not seconded that the Commission grant the waiver.

Commissioner Hur stated that he would like to hear public comment first.

Public Comment:

David Pilpel spoke in support of the waiver. He stated that he has had concerns about the Commission granting waivers over time, but that this seat needs to be filled and calls for specific qualifications. He stated that it would have been helpful if the waiver request came sooner, as Mr. Pearlman has already been a part of two HPC meetings.

Executive Director St. Croix stated that the matter had been originally planned for the last meeting, but was postponed due to scheduling problems.

Chairperson Hayon stated that she was concerned about putting undue obstacles in the way of citizens in San Francisco who want to serve, especially when an area of special expertise is required. She stated that the Commission wants people to participate in the governmental process and should not make it more difficult or impossible to serve.

Commissioner Hur stated that he was struggling with the term "necessary" as it sounds like there were other qualified candidates. He stated that he is inclined to vote to allow the waiver because he also recognizes that, if the Commission does not grant the waiver, the Commission is essentially saying that a

small-business owner would not be able to sit on a position like this. He did not agree with categorically eliminating an entire group of people from serving on this Commission. Chairperson Hayon agreed.

Motion 13-04-22-2 (Renne/Hur): Moved, seconded, and passed (3-0; Studley excused) that the Commission grant the waiver.

Mr. Pearlman thanked the Commissioners.

IV. Discussion and possible action on proposed Ethics Commission regulations to require signers of electronic campaign finance reports to file a completed Signature Verification Form with the Commission.

Steven Massey, Ethics Commission Information Technology Officer, stated that local agencies may now accept campaign finance statements in an electronic format, instead of paper. He stated that section 1.112 of the Campaign Finance Reform Ordinance was amended last year, approved by the Mayor and Board of Supervisors, and went into effect in March 2013. He stated that all statements must be signed under the penalty of perjury and that the staff memorandum explains how filers will be able to comply with the signature requirement. He stated that staff reviewed what has been proposed in other jurisdictions and staff decided that the filer should sign a signature card and then receive a filer ID and PIN code. He stated that the cards would only be completed once and would be sufficient for all filings filed with the Ethics Commission. He stated that San Diego developed a similar procedure that it began this year, but that the paper is faxed to the office. He stated that staff proposes that the person either sign the card in front of Ethics Commission staff or have the person get the signature card notarized.

Public Comment:

David Pilpel stated that he supported the proposal. He stated that many potential obstacles appear to be addressed by the notary requirement. He commented on the draft notice to committees and asked when staff would notify them of the change. He also stated that Mr. Massey is doing a good job.

Mr. Massey stated that the committees would be notified as soon as possible because they will need some time to complete the card, regardless of whether they will come into the Ethics Commission office. He

stated that copies of an individual's ID would not be made or kept by Commission staff and that it would only be used to verify identity in person. Chairperson Hayon asked whether staff would begin the process, even though the Board may not approve the change. Executive Director St. Croix stated that the Board could stop the process, but then staff would just have signature cards.

Commissioner Hur asked whether Mr. Massey was aware of any issues about how San Diego or any other jurisdictions have had using this process. Mr. Massey stated that in San Diego, there is no way to verify who sent the form into the office and who signed it or who is receiving the PIN. He stated that staff would like to use the card for electronic filings for Forms 410 and 501 in the future. He stated that it is important to verify a filer's identity. Executive Director St. Croix stated that the Commission will monitor the process and decide if filers need to sign a new signature card again.

Mr. Massey stated that one of the reasons staff developed this signature card was to separate the candidate and treasurer, using a candidate-controlled committee as an example. He stated that each individual would be required to check in before the statement can be filed. He stated that a treasurer could complete a form, but the form would remain in a pending queue until the candidate confirmed the form as well.

Motion 13-04-22-3 (Hur/Renne): Moved, seconded, and passed (3-0; Studley excused) that the Commission approve the change to the CFRO regulation.

V. Discussion and possible action on Netfile contract.

Mr. Massey stated that the Commission has a contract with NetFile and it ends in September. He stated that the contracting process is lengthy. He stated that NetFile is the only vendor authorized by the Secretary of State. He stated that it is shared by over 20 cities and counties in the state, which has lowered maintenance costs. Executive Director St. Croix stated that the City has a lot of requirements when it comes to contracts. Commissioner Hur thanked Mr. Massey for his hard work on this and on many other website issues. He stated that it does not appear that there are many viable alternatives. Executive Director St. Croix stated that there is no alternative, but if the Commission did not approve, then staff would try to come up with some alternative. He stated that NetFile's work with the City has helped them to make their product more desirable for other jurisdictions. He stated that staff is now asking for more developments and so costs will increase. Mr. Massey stated that the estimated cost will be less than \$120,000/year. Executive Director St.

Croix stated that staff needs the Commission's approval in order to continue with the contract process with other departments.

Public Comment:

David Pilpel stated that the amount quoted is less than the fully loaded costs of a programmer. He stated that a new contract with NetFile is the best course of action.

Motion 13-04-22-4 (Renne/Hur): Moved, seconded, and passed (3-0; Studley excused) that the Commission endorse staff's proposal that contracting out is the most effective way to provide the electronic filing system that meets the needs of the Ethics Commission.

VI. Discussion and possible action on the minutes of the Commission's special meeting of April 1, 2013.

Public Comment:

David Pilpel stated that he found no errors.

Motion 13-04-22-5 (Hur/Renne): Moved, seconded, and passed (3-0; Studley excused) that the Commission approve the minutes of the Commission's special meeting of April 1, 2013.

VII. Discussion of the Executive Director's Report.

Executive Director St. Croix stated that the May meeting is scheduled on a City holiday, so it has been rescheduled for a special meeting at 5:30 PM on Thursday, May 30. He stated that the Commission plans on addressing the Budget & Legislative Analyst's report that it issued last year and that the discussion may take some time. He also attached a publicity piece from a company that chose to highlight the Commission's website and the use of the product.

Public Comment:

David Pilpel thanked staff for including information under section two about settlement agreements.

VIII. Items for future meetings.

None.

Public Comment:

None.

IX. Public comment on matters appearing or not appearing on the agenda that are within the jurisdiction of the Ethics Commission.

None.

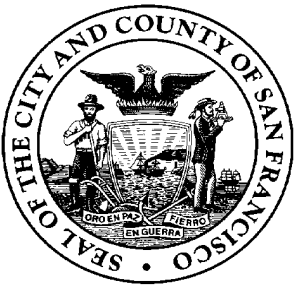
X. Adjournment.

Chairperson Hayon thanked staff about her first meeting as Chair and stated that it was the shortest meeting she had ever attended.

Motion 13-04-22-6 (Renne/Hur): Moved, seconded, and passed (3-0; Studley excused) that the Commission adjourn.

The meeting adjourned at 6:16 PM.

Posted in [Commission Meeting Minutes](#)



ETHICS COMMISSION CITY AND COUNTY OF SAN FRANCISCO

PRESS RELEASE

SUSAN J. HARRIMAN
CHAIRPERSON

EMI GUSUKUMA
VICE CHAIRPERSON

EILEEN HANSEN
COMMISSIONER

JAMIENNE S. STUDLEY
COMMISSIONER

CHARLES L. WARD
COMMISSIONER

JOHN ST. CROIX
EXECUTIVE DIRECTOR

Contact:
John St. Croix
(415) 252-3100

For release:
April 10, 2007

SUMMARY OF ACTIONS TAKEN AT APRIL 9, 2007 MEETING

At its meeting on April 9, 2007, the San Francisco Ethics Commission took the following action:

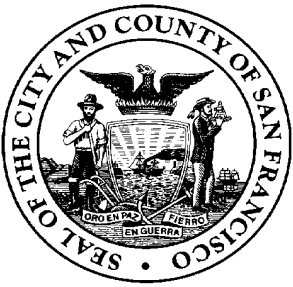
- After receiving testimony from the departments and public comment, initially adopted, by a 3-0 vote, the Statements of Incompatible Activities (“SIAs”) for the Airport Commission, the Department of Human Resources, and the Taxi Commission. Under the law, the City will engage in meet and confer sessions with the affected unions prior to final adoption of the SIAs by the Commission.
- Considered and continued until the next meeting its consideration of draft regulations to implement section 3.216 of the Campaign and Governmental Conduct Code related to gifts from restricted sources, and three additional amendments to regulations governing conflicts of interest.
- Considered an overview of federal, state and local laws governing lobbyists. The Commission expects to consider possible changes to the Lobbyist Ordinance, San Francisco Campaign and Governmental Conduct Code section 2.100 et seq., at its meeting in June 2007.
- Approved by a vote of 3-0 a proposal to provide an electronic online filing system for campaign disclosure reports using a private vendor.
- After receiving public comment, adopted by a 3-0 vote, a revised template for the Statements of Incompatible Activities.

- After receiving public comment, adopted by a 3-0 vote, proposed regulations to implement provisions of the Campaign Finance Reform Ordinance as well as amendments to existing regulations.
- The Commission's next regular meeting will be held on Monday, May 14, 2007, at 5:30 p.m. in Room 408 City Hall.

#

The Ethics Commission, established in November 1993, serves the public, City employees and officials and candidates for public office through education and enforcement of ethics laws. Its duties include: filing and auditing of campaign finance disclosure statements, lobbyist and campaign consultant registration and regulation, administration of the public financing program, whistleblower program, conflict of interest reporting, investigations and enforcement, education and training, advice giving and statistical reporting.

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ETHICS COMMISSION CITY AND COUNTY OF SAN FRANCISCO

PRESS RELEASE

**For release:
April 23, 2013**

**Contact:
John St. Croix
(415) 252-3100**

BEVERLY HAYON
CHAIRPERSON

PAUL A. RENNE
VICE-CHAIRPERSON

BENEDICT Y. HUR
COMMISSIONER

JAMIENNE S. STUDLEY
COMMISSIONER

JOHN ST. CROIX
EXECUTIVE DIRECTOR

SUMMARY OF ACTIONS TAKEN AT APRIL 22, 2013 MEETING

At its regular meeting on April 22, 2013, the San Francisco Ethics Commission took the following actions:

- By a vote of 3-0, granted a waiver to Jonathan Pearlman from the ban on compensated advocacy under San Francisco Campaign and Governmental Conduct Code section 3.224. Mr. Pearlman is a licensed architect who occupies Seat 3, the architectural historian seat, on the Historic Preservation Commission.
- By a vote of 3-0, approved regulations to require signers of electronic campaign finance reports to file a completed Signature Verification Form with the Commission. A regulation adopted by the Commission is effective 60 days after its adoption unless before the expiration of the 60-day period, the Board of Supervisors vetoes the regulation by a two-thirds vote.
- By a vote of 3-0, with respect to a renewed contract with Netfile for professional services, determined that contracting out is the most effective way of providing an electronic filing system that meets the needs of the Ethics Commission, its filers and members of the public.

The next meeting of the Commission will be a special meeting to be held on Thursday, May 30, 2013 in Room 416 City Hall. The special meeting will be held because the Commission's regular 4th Monday of the month meeting in May 2013 falls on a holiday.

#

The Ethics Commission, established in November 1993, serves the public, City employees and officials and candidates for public office through education and enforcement of ethics laws. Its duties include: filing and auditing of campaign finance disclosure statements, lobbyist and campaign consultant registration and regulation, administration of the public financing program, whistleblower program, conflict of interest reporting, investigations and enforcement, education and training, advice giving and statistical reporting.

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PRESS RELEASE

Contact:
John St. Croix
(415) 252-3100

For release:
December 15, 2009

SUMMARY OF ACTIONS TAKEN AT DECEMBER 14, 2009 MEETING

At its meeting on December 14, 2009, the San Francisco Ethics Commission took the following actions:

- Determined, by a vote of 4-0, that continuing its contract with Netfile is the most efficient way for the Ethics Commission to provide electronic filing services related to the Commission's campaign finance, financial disclosure and lobbyist reports;
- Adopted, by a series of 4-0 and 5-0 votes, amendments to the Commission's regulations for the Lobbyist Ordinance, San Francisco Campaign and Governmental Conduct Code section 2.100 et seq. The amendments implement the changes to the Ordinance that will take effect on January 1, 2010. They delete regulations that are no longer necessary; clarify that a person communicating with a City officer on behalf of a labor union is making a contact under the Ordinance unless the communication relates to the working conditions of employees represented by a collective bargaining agreement or memorandum of understanding with the City; require a lobbyist to supply a digital color photograph to aid identification; permit a business, firm or organization to register and file reports on behalf of individual lobbyists; and require each lobbyist to register and submit information required under the Ordinance using the Commission's online filing system.
- Adopted, by a 5-0 vote, technical amendments to the Commission's regulations for the Campaign Finance Reform Ordinance (CFRO), San Francisco Campaign and Governmental Conduct Code section 1.100 et seq. Such amendments implement the changes to the CFRO that will take effect on January 1, 2010. The Commission also adopted, by separate 5-0 votes, a regulation clarifying that a candidate committee would not violate the committee's trust account limit if it transfers excess contributions to the candidate's campaign contingency trust account within two business days of depositing those contributions, and a regulation clarifying how the Commission would lift voluntary expenditure ceilings.
- Approved, by a 4-1 vote, a recommendation that the Commission submit, for the 2010-2011 fiscal year, a budget request at this year's budget figures.

The Commission's next scheduled meeting will be held on Monday, January 11, 2009, at 5:30 p.m. in Room 408 City Hall.

#

The Ethics Commission, established in November 1993, serves the public, City employees and officials and candidates for public office through education and enforcement of ethics laws. Its duties include: filing and auditing of campaign finance disclosure statements, lobbyist and campaign consultant registration and regulation, administration of the public financing program, whistleblower program, conflict of interest reporting, investigations and enforcement, education and training, advice giving and statistical reporting.

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PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ETHICS COMMISSION

Dept. Code: ETH

Type of Request: Initial Modification of an existing PSC (PSC # 40949 - 16/17)

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

Type of Service: Electronic Filing System

Funding Source: General Fund

PSC Original Approved Amount: \$1,374,750 PSC Original Approved Duration: 05/10/17 - 06/30/20 (3 years 7 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/20-06/30/22 (2 years)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/22-06/30/24 (2 years 1 day)

PSC Cumulative Amount Proposed: \$1,374,750 PSC Cumulative Duration Proposed: 7 years 7 weeks

1. Description of Work

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

The Ethics Commission currently contracts with a private vendor to provide an electronic filing system to file ethics forms and maintain its filing records databases. The forms include Fair Political Practices Commission (FPPC) and local campaign finance forms, Statement of Economic Interests, lobbyist reports and campaign consultant reports. The Secretary of State's approval is required for filing systems that submit electronic FPPC campaign finance forms and the Ethics Commission can only contract with vendors on the Secretary of State's certified vendor list. The FPPC's approval is required for filing systems that submit electronic Statement of Economic Interest filings. The Ethics Commission requires a service that includes web-based filing software for filers, a back-office administration system, a database, and a search engine for online public disclosure. This system must be hosted by the vendor's server infrastructure.

This personal services contract will include developing additional components for the Ethics Commission's existing electronic filing system, technical support, and system maintenance. The new components include new reporting requirements for Expenditure Lobbyists as required by Measure C (adopted by San Francisco voters in the November 3, 2015 election), new electronic forms required by the Committee on Information Technology (COIT)-funded Efiling Conversion Project, and new lobbyist registration requirements included in Measure T (adopted by San Francisco voters in the November 8, 2016 election). On January 20, 2017, the Mayor signed into law an ordinance requiring the electronic filing of behested payment reports by City boards and commissions, which becomes operative on January 1, 2018. The new contract will also provide flexibility to add additional forms and functionality to the system when new legislation is passed during the contract term.

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

The Ethics Commission is required by state and local law to provide an electronic filing system. See San Francisco Campaign and Governmental Conduct Code § 1.112, California Government §§ 84600 et seq, FPPC Regulation 18756(c), and Ethics Commission Regulation 2.140(a)1. The Ethics Commission currently offers an electronic filing system to comply with these laws and regulations by contracting with the only agency vendor solution in the state that produces an electronic filing and management system that is currently certified by the Secretary of State. This system is used by over 88 other local California jurisdictions. By working with other California jurisdictions with similar or the same ethics filing requirements, the Commission significantly reduces the cost of providing electronic filing and management systems by using the same software statewide. Voters provided funding through the Expenditure Lobbyist program (Measure C) and the new Lobbyist registration requirements (Measure T) with the specific intent that the Ethics Commission establish an electronic filing system that complies with the law. The Ethics Commission must also comply with COIT project requirements to add several electronic forms to the existing Statement of Economic Interests (SEI Form 700) system and to expand the electronic filing of SEI Form 700 to more than 3,500 designated filers at the department level. In addition, recently passed legislation (Ordinance #160478) proposes that the Ethics Commission produce an electronic filing system to allow members of boards and commissions to electronically file behested

payment reports, which becomes operative on January 1, 2018. Failure to provide these services will, in some cases, require forms to be filed on paper, which is contrary to what the law will require.

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.
43866 - 12/13

D. Will the contract(s) be renewed?

Yes, the contract will need to be renewed in the future to be in compliance with state and local law.

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

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

A. Display all that apply

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

Explain the qualifying circumstances:

DT has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

B. Reason for the request for modification:

We are exercising a clause within our current contract to extend the term for two more years to continue maintenance and support service. This will be the second time we will have extended this contract.

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

A. Specify required skills and/or expertise: Requires knowledge of the Commission's existing electronic filing system, local and state campaign finance, lobbyist and financial disclosure laws and regulations, local campaign consultant regulations, and Secretary of State and FPPC regulations and data requirements. Programmers, database administrators and server technicians would be needed for the City to independently create an electronic filing system service to match the capabilities of a private service provider. Support technicians would be needed to provide support during business and after hours.

B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The vendor will use a server infrastructure that the Ethics Commission does not have the resources to reproduce as well as off-site backup facilities. The server infrastructure must be able to handle high volumes of traffic during filing deadlines. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

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 Department of Telecommunications has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The Ethics Commission believes a new civil service class would be unnecessary for this project.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
The vendor will provide initial staff training on how to use and support the system. The Ethics Commission does not expect to receive more than 5 hours of training. After receiving training, the Ethics Commission staff will train filers how to use the system. The Ethics staff will receive training from the vendor, including clerks and administrative analysts.

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

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

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

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

7. Union Notification: On 01/21/22, the Department notified the following employee organizations of this PSC/RFP request:

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

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

Name: Gayathri Thaikkendiyil Phone: 415-252-3107 Email: gayathri.thaikkendiyil@sfgov.org

Address: 25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40949 - 16/17

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 02/17/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ETHICS COMMISSION

Dept. Code: ETH

Type of Request: Initial Modification of an existing PSC (PSC # 40949 - 16/17)

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

Type of Service: Electronic Filing System

Funding Source: General Fund

PSC Original Approved Amount: \$1,374,750 PSC Original Approved Duration: 05/10/17 - 06/30/20 (3 years 7 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/20-06/30/22 (2 years)

PSC Cumulative Amount Proposed: \$1,374,750 PSC Cumulative Duration Proposed: 5 years 7 weeks

1. Description of Work

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

The Ethics Commission currently contracts with a private vendor to provide an electronic filing system to file ethics forms and maintain its filing records databases. The forms include Fair Political Practices Commission (FPPC) and local campaign finance forms, Statement of Economic Interests, lobbyist reports and campaign consultant reports. The Secretary of State's approval is required for filing systems that submit electronic FPPC campaign finance forms and the Ethics Commission can only contract with vendors on the Secretary of State's certified vendor list. The FPPC's approval is required for filing systems that submit electronic Statement of Economic Interest filings. The Ethics Commission requires a service that includes web-based filing software for filers, a back-office administration system, a database, and a search engine for online public disclosure. This system must be hosted by the vendor's server infrastructure.

This personal services contract will include developing additional components for the Ethics Commission's existing electronic filing system, technical support, and system maintenance. The new components include new reporting requirements for Expenditure Lobbyists as required by Measure C (adopted by San Francisco voters in the November 3, 2015 election), new electronic forms required by the Committee on Information Technology (COIT)-funded Efiling Conversion Project, and new lobbyist registration requirements included in Measure T (adopted by San Francisco voters in the November 8, 2016 election). On January 20, 2017, the Mayor signed into law an ordinance requiring the electronic filing of behested payment reports by City boards and commissions, which becomes operative on January 1, 2018. The new contract will also provide flexibility to add additional forms and functionality to the system when new legislation is passed during the contract term.

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

The Ethics Commission is required by state and local law to provide an electronic filing system. See San Francisco Campaign and Governmental Conduct Code § 1.112, California Government §§ 84600 et seq, FPPC Regulation 18756(c), and Ethics Commission Regulation 2.140(a)1. The Ethics Commission currently offers an electronic filing system to comply with these laws and regulations by contracting with the only agency vendor solution in the state that produces an electronic filing and management system that is currently certified by the Secretary of State. This system is used by over 88 other local California jurisdictions. By working with other California jurisdictions with similar or the same ethics filing requirements, the Commission significantly reduces the cost of providing electronic filing and management systems by using the same software statewide. Voters provided funding through the Expenditure Lobbyist program (Measure C) and the new Lobbyist registration requirements (Measure T) with the specific intent that the Ethics Commission establish an electronic filing system that complies with the law. The Ethics Commission must also comply with COIT project requirements to add several electronic forms to the existing Statement of Economic Interests (SEI Form 700) system and to expand the electronic filing of SEI Form 700 to more than 3,500 designated filers at the department level. In addition, recently passed legislation (Ordinance #160478) proposes that the Ethics Commission produce an electronic filing system to allow members of boards and commissions to electronically file behested payment reports, which becomes operative on January 1, 2018. Failure to provide these services will, in some cases, require forms to be filed on paper, which is contrary to what the law will require.

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.
40949-16/17

D. Will the contract(s) be renewed?

Yes, the contract will need to be renewed in the future to be in compliance with state and local law.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

DT has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

B. Reason for the request for modification:

We are exercising a clause within our current contract to extend the term for two more years to continue maintenance and support service.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Requires knowledge of the Commission's existing electronic filing system, local and state campaign finance, lobbyist and financial disclosure laws and regulations, local campaign consultant regulations, and Secretary of State and FPPC regulations and data requirements. Programmers, database administrators and server technicians would be needed for the City to independently create an electronic filing system service to match the capabilities of a private service provider. Support technicians would be needed to provide support during business and after hours.

B. Which, if any, civil service class(es) normally perform(s) this work? 1041, IS Engineer-Assistant; 1042, IS Engineer-Journey; 1043, IS Engineer-Senior; 1044, IS Engineer-Principal; 1051, IS Business Analyst-Assistant; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The vendor will use a server infrastructure that the Ethics Commission does not have the resources to reproduce as well as off-site backup facilities. The server infrastructure must be able to handle high volumes of traffic during filing deadlines. In addition, the vendor has over a decade of experience working with the Secretary of State's electronic format for financial disclosure documents.

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 Department of Telecommunications has informed the Commission that it is not in the practice of competing with viable and cost effective private software solutions. Since private vendors offering these services use proprietary software and their own server infrastructure, development and maintenance is only performed by the vendor. Civil service employees would be unable to provide support for the system.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: The Ethics Commission believes a new civil service class would be unnecessary for this project.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
The vendor will provide initial staff training on how to use and support the system. The Ethics Commission does not expect to receive more than 5 hours of training. After receiving training, the Ethics Commission staff will train filers how to use the system. The Ethics staff will receive training from the vendor, including clerks and administrative analysts.
- 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.
Yes, contracted with Netfile, Inc. since 2007
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
Yes, the Ethics Commission approved
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 12/23/19, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

Name: Jessica Blome Phone: 415-252-3116 Email: Jessica.blome@sfgov.org

Address: 25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40949 - 16/17

DHR Analysis/Recommendation:

02/03/2020

Commission Approval Required

Approved by Civil Service Commission

02/03/2020 DHR Approved for 02/03/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: Initial Modification of an existing PSC (PSC # 49252 - 21/22)

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

Type of Service: Child Abuse Prevention Plan

Funding Source: Federal funds passed through State to HSA

PSC Original Approved Amount: \$476,131 PSC Original Approved Duration: 11/01/21 - 10/31/23 (1 year 52 weeks)

PSC Mod#1 Amount: \$550,000 PSC Mod#1 Duration: 11/24/21-10/31/24 (1 year 1 day)

PSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 11/24/21-10/31/26 (2 years)

PSC Cumulative Amount Proposed: \$2,026,131 PSC Cumulative Duration Proposed: 5 years

1. Description of Work

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

The scope of work shall include technical assistance and best practices in the implementation and evaluation of FFPSA prevention programs and services in the following areas: prevention program development and implementation that leverages a public and private partner network; determining funding sources for services; developing provider and San Francisco Human Services Agency capacity and processes to capture services costs in alignment with Family First Prevention Place Services Act requirements and California Department of Social Services instructions for claiming; continuous quality improvement utilizing programmatic and data evaluation and findings; and related coaching, supervision, and capacity building. The expected outcome is development and implementation of an integrated citywide plan that increases economic stability, reduces child maltreatment, and improves child welfare permanency outcomes through coordinated prevention programs provided to children, youth and families of the City and County of San Francisco.

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

Family First Prevention Place Services Act (FFPSA) was signed into law on February 9, 2018, and significantly changed the landscape of the Title IV-E federal funding distribution as child welfare can utilize Title IV-E funding to pay for services to prevent children from entering or re-entering foster care. If these consultant services aren't provided, millions in General fund that could be shifted to the Federal and State revenue sources could be misallocated.

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 49252 - 21/22

D. Will the contract(s) be renewed?

The City shall have the option to extend the term for a period of two (2) years, subject to annual availability of funds, annual satisfactory grantee performance, and need. San Francisco Human Services Agency has the sole, absolute discretion to exercise this option, and reserves the right to enter into agreements of a shorter duration. Unclear if full scope of work will be completed within time frame

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

N/A

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

Need for work is in reference to new Federal policy, changing landscape of eligible child welfare activities.

B. Reason for the request for modification:

Adding another two years of consulting services

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A deep knowledge of skills and experience in the areas of :Child welfare, organizational assessment, development and change, CDSS claiming and reimbursement

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This type of analysis and service is One time only and relatively short term, in response to the FFPSA legal requirements. The work also requires an objective outsider perspective of the child welfare system

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is one time only and it's not practical to create a new class for time limited work. Key to the work is the ability to be impartial and unbiased of the San Francisco Child welfare systems and it's community partners.

6. Additional Information

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

No.

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

no training

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

No.

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

No.

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

No.

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

No.

7. Union Notification: On 08/15/23, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Management & Superv Local 21;

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

Name: Tara Alvarez Phone: Email: tara.alvarez@sfgov.org

Address: 1651 Mission Street, 5th Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49252 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Alvarez, Tara (HSA)

From: dhr-psccordinator@sfgov.org on behalf of tara.alvarez@sfgov.org
Sent: Tuesday, August 15, 2023 4:11 PM
To: Alvarez, Tara (HSA); jharding@ifpte21.org; agarza@ifpte21.org; Laxamana, Junko (DBI); kdavis@ifpte21.org; mweirick@ifpte21.org; ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; l21pscreview@ifpte21.org; Gendelman, Johanna (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 49252 - 21/22 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The HUMAN SERVICES -- DSS has submitted a modification request for a Personal Services Contract (PSC) for \$1,000,000 for services for the period November 24, 2021 – October 31, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/17582>

Email sent to the following addresses: L21PSCReview@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ewallace@ifpte21.org mweirick@ifpte21.org kdavis@ifpte21.org junko.laxamana@sfgov.org agarza@ifpte21.org jharding@ifpte21.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: Initial Modification of an existing PSC (PSC # 49252 - 21/22)

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

Type of Service: Child Abuse Prevention Plan

Funding Source: Federal funds passed through State to HSA

PSC Original Approved Amount: \$476,131 PSC Original Approved Duration: 11/01/21 - 10/31/23 (1 year 52 weeks)

PSC Mod#1 Amount: \$550,000 PSC Mod#1 Duration: 11/24/21-10/31/24 (1 year 1 day)

PSC Cumulative Amount Proposed: \$1,026,131 PSC Cumulative Duration Proposed: 3 years

1. Description of Work

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

The scope of work shall include technical assistance and best practices in the implementation and evaluation of FFPSA prevention programs and services in the following areas: prevention program development and implementation that leverages a public and private partner network; determining funding sources for services; developing provider and San Francisco Human Services Agency capacity and processes to capture services costs in alignment with Family First Prevention Place Services Act requirements and California Department of Social Services instructions for claiming; continuous quality improvement utilizing programmatic and data evaluation and findings; and related coaching, supervision, and capacity building. The expected outcome is development and implementation of an integrated citywide plan that increases economic stability, reduces child maltreatment, and improves child welfare permanency outcomes through coordinated prevention programs provided to children, youth and families of the City and County of San Francisco.

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

Family First Prevention Place Services Act (FFPSA) was signed into law on February 9, 2018, and significantly changed the landscape of the Title IV-E federal funding distribution as child welfare can utilize Title IV-E funding to pay for services to prevent children from entering or re-entering foster care. If these consultant services aren't provided, millions in General fund that could be shifted to the Federal and State revenue sources could be misallocated.

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 49252 - 21/22

D. Will the contract(s) be renewed?

The City shall have the option to extend the term for a period of two (2) years, subject to annual availability of funds, annual satisfactory grantee performance, and need. San Francisco Human Services Agency has the sole, absolute discretion to exercise this option, and reserves the right to enter into agreements of a shorter duration. Unclear if full scope of work will be completed within time frame

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

N/A

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

Need for work is in reference to new Federal policy, changing landscape of eligible child welfare activities.

- B. Reason for the request for modification:
Adding another year of consulting services

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: A deep knowledge of skills and experience in the areas of :Child welfare, organizational assessment, development and change, CDSS claiming and reimbursement
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This type of analysis and service is One time only and relatively short term, in response to the FFPSA legal requirements. The work also requires an objective outsider perspective of the child welfare system
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is one time only and it's not practical to create a new class for time limited work. Key to the work is the ability to be impartial and unbiased of the San Francisco Child welfare systems and it's community partners.

6. Additional Information

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

7. Union Notification: On 12/03/21, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Management & Superv Local 21;

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

Name: johanna.gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1651 Mission Street, 5th Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49252 - 21/22

DHR Analysis/Recommendation:

01/03/2022

Commission Approval Required

Approved by Civil Service Commission

01/03/2022 DHR Approved for 01/03/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 31207 - 18/19)

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

Type of Service: Aquaria maintenance

Funding Source: General Fund

PSC Original Approved Amount: \$90,000 PSC Original Approved Duration: 08/01/18 - 12/31/22 (4 years 21 weeks)

PSC Mod#1 Amount: \$44,000 PSC Mod#1 Duration: 10/31/21-12/31/23 (1 year)

PSC Mod#2 Amount: \$166,000 PSC Mod#2 Duration: 07/21/23-10/31/28 (4 years 43 weeks)

PSC Cumulative Amount Proposed: \$300,000 PSC Cumulative Duration Proposed: 10 years 13 weeks

1. Description of Work

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

Contractor will provide rental and maintenance of ten 55-gallon, 4-foot aquaria located inside Laguna Honda Hospital (LHH) and one 8-foot aquarium located on the esplanade of the hospital.

Maintenance will include regular feeding of fish and related aquaria animals using automated feeders, at least biweekly evaluation of all aquaria for cleaning and/or repair, and provision of those services as indicated. Results of the evaluation/quality assurance to be shared weekly with Director of Therapeutic Activities and Wellness Department, or their designee.

Contractor will supply all aquaria with appropriate or agreed upon number of fish and any other related animals, and to replace all fish that may die during the course of the contract. Contractor will also provide 24-hour, on-call service for any problems that may occur, such as dead fish, equipment malfunction, or dirty tank conditions, and resolve those problems within 24 hours of the call. Contractor will maintain liaison with the Therapeutic Activities and Wellness Department regarding the operation and condition of the aquaria.

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

These services are necessary for the ongoing therapeutic wellness of residents of Laguna Honda Hospital. The consequences of denial would be the disruption of that wellness.

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 31207 - 18/19

D. Will the contract(s) be renewed?

Yes, as services are deemed necessary by program staff.

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

The duration is over five years so that the PSC can align with the duration in the current solicitation.

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

These as-needed, intermittent services include the capacity to rent 10 55-gallon, 4-foot aquaria and one 8-foot aquarium, and the professional capacity to provide ongoing intermittent/occasional maintenance, including 24-hour, on-call availability. City lacks the appropriate resources, equipment and capacity to provide these services.

B. Reason for the request for modification:

Need for services is ongoing and anticipated to remain so for this requested term.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Required skills include the capacity to rent ten 55-gallon, 4-foot aquaria located inside Laguna Honda Hospital (LHH) and one 8-foot aquarium to be located on the esplanade of the hospital, and the professional capacity to provide ongoing maintenance as required including 24-hour, on-call availability.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor must provide its own equipment needed to perform the 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.
No current civil service classes are trained to provide the required professional capabilities.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Not at this time, as the services are not of sufficient volume and intermittent 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.
Training of civil service employees is not included, as the purpose of the contract is to provide aquaria maintenance services.
- 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.
This service is currently provided by Some Things Fishy

7. **Union Notification:** On 07/21/23, 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: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 1380 Howard Street, Room 421b, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31207 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 31207 - 18/19 - MODIFICATIONS

dhr-psccordinator@sfgov.org

on behalf of

kelly.hiramoto@SFDPH.org

Fri 7/21/2023 4:36 PM

To:Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;jduritz@uapd.com <jduritz@uapd.com>;kdavis@ifpte21.org <kdavis@ifpte21.org>;kdavis@ifpte21.org <kdavis@ifpte21.org>;jharding@ifpte21.org <jharding@ifpte21.org>;mweirick@ifpte21.org <mweirick@ifpte21.org>;mweirick@ifpte21.org <mweirick@ifpte21.org>;agarza@ifpte21.org <agarza@ifpte21.org>;dho@ifpte21.org <dho@ifpte21.org>;dho@ifpte21.org <dho@ifpte21.org>;dvickers@iam1414.org <dvickers@iam1414.org>;SF-DHR-Info@seiu1021.org <SF-DHR-Info@seiu1021.org>;SF-DHR-Info@seiu1021.org <SF-DHR-Info@seiu1021.org>;sbabaria@cirseiu.org <sbabaria@cirseiu.org>;andrea@sfmea.com <andrea@sfmea.com>;camaguey@sfmea.com (contact) <camaguey@sfmea.com>;camaguey@sfmea.com (contact) <camaguey@sfmea.com>;cpark@local39.org <cpark@local39.org>;cpark@local39.org <cpark@local39.org>;khughes@ibew6.org <khughes@ibew6.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$166,000 for services for the period July 21, 2023

– October 31, 2028. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/17391>

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present. Either you selected none or there is no email entered in the system by that particular union

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

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of kelly.hiramoto@SFDPH.org
Sent: Friday, July 21, 2023 4:33 PM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>; jduritz@uapd.com; kdavis@ifpte21.org; kdavis@ifpte21.org;
jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org;
dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org;
sbabaria@cirseiu.org; andrea@sfmea.com; camaguey@sfmea.com (contact) <camaguey@sfmea.com>;
camaguey@sfmea.com (contact) <camaguey@sfmea.com>; cpark@local39.org; cpark@local39.org;
khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferlocal40@gmail.com;
rooferslocal40@gmail.com; Stan Eichenberger <seichenberger@local39.org>; dtuttle@oe3.org; dtubble@oe3.org;
pkim@ifpte21.org; Najuawanda Daniels <najuawanda.daniels@seiu1021.org>; Pierre King - UAPD <pkim@UAPD.com>;
president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org;
mdennis@twusf.org; roger marenco <rmarenco@twusf.org>; pwilson@twusf.org; cmoyer@nccrc.org; Frigault, Noah
(HRC) <noah.frigault@sfgov.org>; sfdpoa@icloud.com; mjayne@iam1414.org; Emanuel, Rachel (DEM)
<rachel.emanuel@sfgov.org>; laborers261@gmail.com; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>;
jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us;
mlobre@sfpoa.org; @sfpoa.org; Tracy McCray <tracym@sfpoa.org>; mleach <mleach@ibt856.org>;
rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; Stan Eichenberger
<seichenberger@local39.org>; Jason Klumb <Jason.Klumb@seiu1021.org>; camaguey@sfmea.com (contact)
<camaguey@sfmea.com>; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com;
WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org;
kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org;
jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sflower.org; Sandeep.lal@seiu1021.me;
pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy Frigillana <wendy.frigillana@seiu1021.org>;
pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net;
leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com;
djohnson@opcmialocal300.org; Ramon Hernandez <ramonliuna261@gmail.com>; ablood@cirseiu.org;
pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li <xiumin.li@seiu1021.org>;
Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com;
staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us;
David Canham <david.canham@seiu1021.org>; jtanner940@aol.com; Osha Ashworth <oashworth@ibew6.org>;
l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com;
christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale <thomas.vitale@seiu1021.org>; Rossi, Ron (DPH)
<ron.rossi@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Modification Request to PSC # 31207 - 18/19 - 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 \$166,000 for services for the period July 21, 2023

– October 31, 2028. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/17391>

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present.

Either you selected none or there is no email entered in the system by that particular union

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 31207 - 18/19)

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

Type of Service: Aquaria maintenance

Funding Source: General Fund

PSC Original Approved Amount: \$90,000 PSC Original Approved Duration: 08/01/18 - 12/31/22 (4 years 21 weeks)

PSC Mod#1 Amount: \$44,000 PSC Mod#1 Duration: 10/31/21-12/31/23 (1 year)

PSC Cumulative Amount Proposed: \$134,000 PSC Cumulative Duration Proposed: 5 years 21 weeks

1. Description of Work

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

Contractor will provide rental and maintenance of ten 55-gallon, 4-foot aquaria located inside Laguna Honda Hospital (LHH) and one 8-foot aquarium located on the esplanade of the hospital.

Maintenance will include regular feeding of fish and related aquaria animals using automated feeders, at least biweekly evaluation of all aquaria for cleaning and/or repair, and provision of those services as indicated. Results of the evaluation/quality assurance to be shared weekly with Director of Therapeutic Activities and Wellness Department, or their designee.

Contractor will supply all aquaria with appropriate or agreed upon number of fish and any other related animals, and to replace all fish that may die during the course of the contract. Contractor will also provide 24-hour, on-call service for any problems that may occur, such as dead fish, equipment malfunction, or dirty tank conditions, and resolve those problems within 24 hours of the call. Contractor will maintain liaison with the Therapeutic Activities and Wellness Department regarding the operation and condition of the aquaria.

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

These services are necessary for the ongoing therapeutic wellness of residents of Laguna Honda Hospital. The consequences of denial would be the disruption of that wellness.

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, as services are deemed necessary by program staff.

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

The duration is over five years so that the PSC can align with the duration in the current solicitation.

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

These as-needed, intermittent services include the capacity to rent 10 55-gallon, 4-foot aquaria and one 8-foot aquarium, and the professional capacity to provide ongoing intermittent/occasional maintenance, , including 24-hour, on-call availability. City lacks the appropriate resources, equipment and capacity to provide these services.

B. Reason for the request for modification:

This modification is to support these continuing services by extending the term and adding to the amount.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Required skills include the capacity to rent ten 55-gallon, 4-foot aquaria located inside Laguna Honda Hospital (LHH) and one 8-foot aquarium to be located on the esplanade of the hospital, and the professional capacity to provide ongoing maintenance as required including 24-hour, on-call availability.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor must provide its own equipment needed to perform the 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.
No current civil service classes are trained to provide the required professional capabilities.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Not at this time, as the services are not of sufficient volume and intermittent 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 contact? If so, please explain what that will entail; if not, explain why not.
Training of civil service employees is not included, as the purpose of the contract is to provide aquaria maintenance services.
- 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.
This service is currently provided by Some Things Fishy

7. Union Notification: On 10/07/21, the Department notified the following employee organizations of this PSC/RFP request:

all unions were notified

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

Name: Phone: 415-554-2938 Email: arlene.lee@sfdph.org

Address: 1380 Howard Street, Room 421b, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31207 - 18/19

DHR Analysis/Recommendation:

11/15/2021

Commission Approval Required

Approved by Civil Service Commission

11/15/2021 DHR Approved for 11/15/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 31236 - 20/21)

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

Type of Service: As-needed, Intermittent Maintenance Services for Floor Machines

Funding Source: General Fund

PSC Original Approved Amount: \$99,000 PSC Original Approved Duration: 07/01/21 - 06/30/24 (3 years)

PSC Mod#1 Amount: \$135,000 PSC Mod#1 Duration: 08/31/23-08/31/25 (1 year 8 weeks)

PSC Cumulative Amount Proposed: \$234,000 PSC Cumulative Duration Proposed: 4 years 8 weeks

1. Description of Work

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

The contractor(s) will provide as-needed repairs and intermittent equipment maintenance for the Department's floor maintenance equipment, which at present is primarily at Zuckerberg San Francisco General Hospital. Equipment requiring these services includes floor cleaning machines, floor buffers, floor burnishers, floor ride-on machines, and other similar equipment. At present, ZSFG must maintain 150-200 equipment items in order to maintain full maintenance capacity. (Note: These are longtime continuing services which previously had not been included as needing PSC approval.)

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

Regular maintenance of facility flooring is necessary to maintain safety and hygiene standards, as well as to comply with regulatory requirements. Failure to maintain equipment appropriately is likely to lead to facility hazards and potentially adverse patient care and/or unsafe workplaces. As the equipment ages, there is more need for repair and maintenance to keep equipment up and running.

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 31236 - 20/21

D. Will the contract(s) be renewed?

Yes, if the need continues and 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

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

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

Explain the qualifying circumstances:

These floor maintenance equipment repair and maintenance services are ordered on an as-needed and intermittent basis, when equipment becomes unusable or due for scheduled maintenance. Maintenance

and repairs must be performed by specially trained and certified staff.

B. Reason for the request for modification:

To extend the duration to align with the anticipated contract term and increase the amount accordingly.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: These floor maintenance equipment repair and maintenance services are ordered on an as-needed and intermittent basis, when equipment becomes unusable or due for scheduled maintenance. Maintenance and repairs must be performed by specially trained and certified staff.

B. Which, if any, civil service class(es) normally perform(s) this work? 7332, Maintenance Machinist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide specialized experts using manufacturer-certified and -authorized proprietary diagnostic/inspection tools and equipment which are required in order not to void warranties,

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.

Standard repair and parts replacement work is performed in-house when the scope of work meets the available resources and staff's knowledge and skills. The contracted services are as-needed and intermittent, based on the diagnostic repair scope. Existing civil service classes are not required to have the brand-specific training and certification needed to perform such repairs, nor does the department have access to the necessary proprietary diagnostic tools/software. For such warranty services or complicated repairs, specialized experts using manufacturer-certified and -authorized proprietary diagnostic/inspection tools and equipment are required.

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 as-needed and intermittent, and specific to 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.
There will be no formal training of civil service employees under this contract.

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.
Bay Area Floor Machine Company

7. **Union Notification:** On 08/08/23, the Department notified the following employee organizations of this PSC/RFP request:
Automotive Machinists, Local 1414;

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

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

Address: 1380 Howard Street, Room 421b, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31236 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 09/18/2023

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of kelly.hiramoto@sfdph.org
To: [Hiramoto, Kelly \(DPH\)](mailto:Hiramoto_Kelly@DPH); dvickers@iam1414.org; mjayne@iam1414.org; agonzalez@iam1414.org; speedy4864@aol.com; [Albert, Reanna \(DPH\)](mailto:Albert_Reanna@DPH); [DHR-PSCCoordinator, DHR \(HRD\)](mailto:DHR-PSCCoordinator@DHR)
Subject: Receipt of Modification Request to PSC # 31236 - 20/21 - MODIFICATIONS
Date: Tuesday, August 8, 2023 1:43:23 PM

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 \$135,000 for services for the period August 31, 2023

– August 31, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/21223>

Email sent to the following addresses: speedy4864@aol.com
agonzalez@iam1414.org
Mjayne@iam1414.org dvickers@iam1414.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: As-needed, Intermittent Maintenance Services for Floor Machines

Funding Source: General Fund

PSC Duration: 3 years

PSC Amount: \$99,000

1. Description of Work

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

The contractor(s) will provide as-needed repairs and intermittent equipment maintenance for the Department's floor maintenance equipment, which at present is primarily at Zuckerberg San Francisco General Hospital. Equipment requiring these services includes floor cleaning machines, floor buffers, floor burnishers, floor ride-on machines, and other similar equipment. At present, ZSFG must maintain 150-200 equipment items in order to maintain full maintenance capacity. (Note: These are longtime continuing services which previously had not been included as needing PSC approval.)

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

Regular maintenance of facility flooring is necessary to maintain safety and hygiene standards, as well as to comply with regulatory requirements. Failure to maintain equipment appropriately is likely to lead to facility hazards and potentially adverse patient care and/or unsafe workplaces. As the equipment ages, there is more need for repair and maintenance to keep equipment up and running.

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.

Previously, these services were provided through standard equipment maintenance agreements. Commission approval is being requested now due to new requirements of the Commission and the Office of Contract Administration.

D. Will the contract(s) be renewed?

Yes, if the need continues and funding is available.

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

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

These floor maintenance equipment repair and maintenance services are ordered on an as-needed and intermittent basis, when equipment becomes unusable or due for scheduled maintenance. Maintenance and repairs must be performed by specially trained and certified staff.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: These floor maintenance equipment repair and maintenance services are ordered on an as-needed and intermittent basis, when equipment becomes unusable or due for scheduled maintenance. Maintenance and repairs must be performed by specially trained and certified staff.

B. Which, if any, civil service class(es) normally perform(s) this work? 7332, Maintenance Machinist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will provide specialized experts using manufacturer-certified and -authorized proprietary diagnostic/inspection tools and equipment which are required in order not to void warranties,

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.

Standard repair and parts replacement work is performed in-house when the scope of work meets the available resources and staff's knowledge and skills. The contracted services are as-needed and intermittent, based on the diagnostic repair scope. Existing civil service classes are not required to have the brand-specific training and certification needed to perform such repairs, nor does the department have access to the necessary proprietary diagnostic tools/software. For such warranty services or complicated repairs, specialized experts using manufacturer-certified and -authorized proprietary diagnostic/inspection tools and equipment are required.

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 as-needed and intermittent, and specific to 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.

No. There will be no formal training of civil service employees under this contract.

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

No.

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

No.

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

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

7. Union Notification: On 02/22/2021, the Department notified the following employee organizations of this PSC/RFP request:
Automotive Machinists, Local 1414

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

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

Address: 1380 Howard Street, Room 421b San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31236 - 20/21

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 03/03/2021