



London Breed  
Mayor

Carol Isen  
Human Resources Director

Date: March 15, 2024

To: The Honorable Civil Service Commission

Through: Carol Isen  
Human Resources Director

From: Cynthia Avakian, AIR  
Joan Lubamersky / Lynn Khaw, GSA  
Matthew Ahn, DEC  
Amy Nuque, MTA  
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Shawndrea Hale / Daniel Kwon, PUC  
Sean McFadden, REC  
Amanda Wentworth, TTX  
Hong Gong, SHF

Subject: **Personal Services Contracts Approval Request**

This report contains eighteen (18) 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
\$91,700,000	\$391,338,783	\$3,872,901,250

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# POSTING FOR

April 01, 2024

## PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
<a href="#">41586 - 23/24</a>	AIRPORT COMMISSION	\$9,500,000.00	Contractor will be responsible for the operation, management and administration of the Medical Clinic at the San Francisco International Airport (SFO). Medical clinic services including travel medicine, urgent care and occupational health services for San Francisco International Airport (SFO) passengers, visitors, Airport Commission (Airport) employees, and employees of SFO tenants.	July 1, 2024	June 30, 2029	REGULAR
<a href="#">45154 - 23/24</a>	AIRPORT COMMISSION	\$400,000.00	Contractor will provide transport of 14 buses from Phoenix Sky Harbor (PHX) Airport to San Francisco International Airport (SFO). The 14 buses are considered inoperable as they have not had any maintenance done in over 14 months. Seven of the buses are known to need mechanical repairs that prevent them from operating under their own power.	April 1, 2024	March 31, 2025	REGULAR
<a href="#">49784 - 23/24</a>	GENERAL SERVICES AGENCY - CITY ADMIN	\$5,600,000.00	Unarmed private security patrol of Treasure Island Development Authority (TIDA) owned and managed buildings, grounds and common areas on Treasure and Yerba Buena Islands, on a 24/7/365 basis with one or two patrol officers on duty at all times. Vendor will patrol public buildings and grounds to safeguard property against damage, hazardous situations, or unauthorized entry. Security patrol service will ensure the security of critical TIDA-owned properties and support TIDA in maintaining a safe environment on Treasure and Yerba Buena Islands through securing unoccupied/abandoned TIDA-owned buildings, performing	February 1, 2024	January 31, 2031	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			regular mobile patrol/observe/report of Treasure Island residential housing and high-traffic public areas of the Islands, serving as visible public ambassadors providing directions to visitors, managing residential parking programs on behalf of Treasure Island housing manager agencies			
<u>45432 - 23/24</u>	Department of Early Childhood	\$10,000,000.00	<p>DEC is seeking to partner with external experts for four distinct service areas for the early care and education field:</p> <ol style="list-style-type: none"> <li>1) Data Mapping and Data Governance for better utilization, tracking, and reporting of information coming into the Department of Early Childhood (DEC);</li> <li>2) High quality Evaluation Implementation for six critical early childhood initiative program areas within the DEC;</li> <li>3) Landscape Analysis to understand the broader context DEC operates within; and</li> <li>4) Data Systems Development and Systems Project Management for identifying database and data system needs and advising on software development.</li> </ol> <p>Services will include: 1) connecting and standardizing multiple data sources into a cohesive framework to aid evaluation, while also supporting the further development and refining of the data at DEC; 2) formative, process, and outcome evaluation efforts; 3) yearly needs assessment of San Francisco families; 4) supporting the development and management of data systems technology.</p>	July 1, 2024	June 30, 2029	REGULAR
<u>40625 - 23/24</u>	MUNICIPAL TRANSPORTATION AGENCY	\$20,000,000.00	The scope of this project is to purchase roughly \$14.5M of custom manufactured brake parts required for the Light Rail Vehicles (LRV4) proprietary brake system then also perform roughly \$6M of professional overhaul services for a planned overhaul program in accordance with recommended maintenance interval established by the manufacturer.	April 1, 2024	September 30, 2026	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			<p>This overhaul will be for the hydraulic brake systems on 68 Phase 1 Siemens LRV4 light rail vehicles for the San Francisco Municipal Transportation Agency. This overhaul conforms to the scheduled maintenance recommended by the Brakes Manufacturer. Maintenance intervals on the brakes system are every 6 years. This will be the first major system overhaul on LRV4 vehicles, the oldest of which are coming out of their 5-year base warranty period. Performing this overhaul is in keeping with SFMTA's commitment to remain up-to-date on scheduled maintenance to maximize life and minimize lifecycle costs for the LRV4 fleet.</p> <p>The overhaul program includes brakes subsystems including the Hydraulic Power Unit (HPU), Accumulator, and Brake Discs. Motor Truck (MT) calipers and Center Truck (CT) calipers in this overhaul program will be included in the necessary standard overhaul activities as well as upgrading parts (to improve reliability and address known warranty issues) to optimize the performance of these products.</p> <p>\$14.5M of this project will be used for the purchase of proprietary custom-manufactured parts. The parts are to be sold as a packaged overhaul kit as part of this contract. In delivering the overhaul, the Contractor shall provide all parts, materials, tools, labor, inspections, facilities, and equipment required to complete this work, which includes removal and replacement (R&amp;R) of the brake system, shipment of the system to the site of original manufacture in Duncan, South Carolina, disassembly of the existing brakes systems, disposal of used parts, cleaning, inspecting for wear and damage, overhaul and remanufacture to original specifications, quality inspection, shipping back to San Francisco Municipal Transportation Agency (SFMTA), and putting the brake systems back on the LRV4 fleet.</p>			

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			<p>All rehabilitation work will be performed off-site, as the work requires a clean room with specialized production equipment. The Contractor shall provide a Field Services team to execute on-train services.</p> <p>Because the contractor is also the original manufacturer, and because the manufacturer is supplying all parts, and because the manufacturer is performing the overhaul rebuild, the Contractor will provide a three-year warranty on all rebuilt components.</p>			
<u>45046 - 23/24</u>	PORT	\$190,000.00	<p>The Port is interested in entering in one or more contracts for training and coaching on psychological training on an on-going basis for 2 years. The general scope of work would include training and coaching at several levels of the organization: executive team, managers, and supervisors (approximately 65 - 75 employees). The Port has a total of 258 employees and are divided in the following divisions: Engineering, Environmental and Planning, Real Estate, Finance and Administration, Maintenance, Maritime. The awardee(s) will work with leadership from each of the above-mentioned divisions.</p> <p>Project Outcomes:</p> <p>Below are the expected outcomes from this project:</p> <p>Port supervisors, managers and executive team understand and can fluently discuss and explain the concept of psychological safety.</p> <p>Measure how psychologically safe our workplace is currently.</p> <p>Identify what might be hindering psychological safety in our teams/divisions.</p> <p>Create actions to help us build a psychologically safe workplace that include training and coaching.</p>	December 1, 2023	November 30, 2025	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			The Port understands psychological safety to be the condition in which you feel (1) included, (2) safe to learn, (3) safe to contribute, and (4) safe to challenge the status quo – all without fear of being embarrassed, marginalized, or punished in some way.			
<a href="#">41513 - 23/24</a>	PUBLIC HEALTH	\$5,000,000.00	The contractor will provide a neurophysiologist or neurophysiology technologist with a specialization in the fields of neurophysiological monitoring performing many tests that help diagnose brain and nervous system functions. Tests and procedures they perform include electroencephalograms (EEGs) and electromyography (EMG) that are used to assess brain activity.	June 1, 2024	May 31, 2029	REGULAR
<a href="#">39276 - 23/24</a>	PUBLIC UTILITIES COMMISSION	\$120,000.00	Holm Powerhouse (HPH) thrust, and guide bearings were manufactured by supplier. Each Hetch Hetchy Water and Power (HHWP) powerhouse keeps a spare set of bearings on location for emergency replacement as the bearings are not a readily available part. In Fall of 2018 HPH spares were used to replace damaged bearings, leaving the powerhouse without a functional set of spares for the past 5 years. Without these emergency spares, the powerhouse is at great risk of an extended shutdown if failure of the operating set was to occur. It is critical that these spares are ready and available for operation with confidence that they will perform without failure. The supplier holds proprietary drawings of these specific bearings that contain critical dimensions not found elsewhere. Use of a different vendor would require measurement of an existing, non-damaged bearing surface to gather these dimensions. The uncertainty of where the measured bearing could lay in the OEM tolerance range coupled with the unknown level of wear to the measured surface itself makes this unacceptable to base rehabilitation on	February 29, 2024	December 29, 2025	REGULAR



<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			and compromises the precise nature of these hydrodynamic bearings. It is for the reasons listed above that this work must be done by the original manufacturer. In the past, use of different vendors has previously resulted in defective re-pours and fretting from the factory. With the performance of the generators relying heavily on the proper function of these bearings, any defects are unacceptable and original design parameters must be maintained.			
<a href="#">42198 - 23/24</a>	PUBLIC UTILITIES COMMISSION	\$140,000.00	<p>CleanPowerSF's 100% renewable energy products have been Green-e verified since its launch in 2016. Certifying renewable energy products through Green-e provides customers with the assurance that they are reducing the environmental impact of their energy use. Green-e provides consumer protection through clear guidelines, disclosures and standards regarding the sale and marketing of renewable energy. Participating in the program has become an industry standard, and customers committed to quantifying and reporting their emissions through the purchase of a CleanPowerSF renewable energy product may require a verified product. For example, customers who are looking to earn leadership in Energy and Environmental Design (LEED) points for their LEED certification by purchasing renewable energy are required to sign contracts for products that are Green-e certified or equivalent. To receive Green-e verification, CleanPowerSF's submitted energy products must undergo a third party audit which verifies that energy purchases are matched with generation from eligible renewable facilities. The auditor will review CleanPowerSF product enrollment and sales data and compare them against renewable energy purchases following the Center for Resource Solutions auditing protocol.</p> <p>Currently, CleanPowerSF offers two 100% renewable energy products: (1) SuperGreen provides 100% renewable energy at a</p>	October 1, 2024	September 30, 2029	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			slight premium over the default Green product; and (2) SuperGreen Saver, which provides 100% renewable energy for low-income customers in defined disadvantaged communities in San Francisco. SuperGreen Saver is CleanPowerSF's branded product under the Disadvantaged Communities Green Tariff (DAC-GT) program of the California Public Utilities Commission. In the future, CleanPowerSF may provide other renewable energy products that will be Green-e certified and will also require Green-e audit services.			
<a href="#">42846 - 23/24</a>	PUBLIC UTILITIES COMMISSION	\$750,000.00	The SFPUC seeks to select Proposers with proven expertise and extensive experience in the following areas: 1. Provide aerial surveying and patrol services to support the maintenance of the power transmission system; 2. Provide priority transportation services for emergency repairs of infrastructure not accessible during certain periods of the year; 3. Provide transportation to HHWP facilities in the event of unforeseen disasters or emergencies; provide training for Human External Cargo operations, and 4. Provide as-needed shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.	May 21, 2024	May 20, 2029	REGULAR
<a href="#">49592 - 23/24</a>	RECREATION AND PARK COMMISSION	\$2,500,000.00	RPD wishes to select a pool of two to three consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$800,000, and funds would not be encumbered until a specific project has been assigned to a consultant.  Examples of the types of analyses to be performed by consultants include: <ul style="list-style-type: none"> <li>• Conditions assessment and building use analysis</li> <li>• Recommendations for treatment of known historic resources</li> <li>• Preparation of HRE 1 &amp; 2 reports consistent with the</li> </ul>	May 1, 2024	May 1, 2029	REGULAR

<u>PSC No</u>	<b>Dept Designation</b>	<b>PSC Amount</b>	<b>Description of Work</b>	<b>PSC Estimate d Start Date</b>	<b>PSC Estimate d End Date</b>	<b>Type of Approval</b>
			<p>requirements of the SF Planning Department</p> <ul style="list-style-type: none"> <li>• Feasibility of reuse scenarios analysis for historic buildings and structures</li> <li>• Order-of-magnitude cost estimates for renovation of historic buildings and structures</li> <li>• Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope</li> <li>• Architectural drawings for repairs to original elements of historic buildings and structures</li> <li>• Architectural drawings of historic buildings and structures to document existing conditions</li> </ul>			
<a href="#">42965 - 23/24</a>	TREASURER/T AX COLLECTOR	\$4,000,000.00	<p>The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.</p>	July 1, 2024	June 30, 2029	REGULAR
<a href="#">43614 - 23/24</a>	TREASURER/T AX COLLECTOR	\$4,000,000.00	<p>The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and</p>	July 1, 2024	June 30, 2029	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimate d Start Date	PSC Estimate d End Date	Type of Approval
			other locations identified by the financial coaching service provider in partnership with OFE.			
<a href="#">44429 - 23/24</a>	TREASURER/T AX COLLECTOR	\$4,000,000.00	The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.	July 1, 2024	June 30, 2029	REGULAR
<a href="#">46970 - 23/24</a>	TREASURER/T AX COLLECTOR	\$4,000,000.00	The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.	July 1, 2024	June 30, 2029	REGULAR
<b>TOTAL AMOUNT \$70,200,000.00</b>						

# Posting For April 01, 2024

## Proposed Modifications to Personal Services Contracts

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
40238 - 19/20 - MODIFICATIONS	SHERIFF -- SHF	\$0	\$3,600,000	The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.	07/01/2024	07/31/2025	REGULAR
4141-11/12 - MODIFICATIONS	PUBLIC UTILITIES COMMISSION -- PUC	\$2,500,000	\$35,600,000	Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.	01/29/2024	04/30/2025	REGULAR
47941 - 18/19 - MODIFICATIONS	PUBLIC UTILITIES	\$19,000,000	\$38,000,000	SFPUC civil, structural, electrical; process, mechanical, and other specialized engineering	02/22/2024	12/31/2029	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
	COMMISSION -- PUC			services in the design and support during construction of a new raw water ozonation system, flocculant aid polymer system, and various needed upgrades at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues and plant reliability. Major plant upgrades include new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, backup power facilities, polymer mixing skids, polymer aging tanks, transfer pumps, polymer building, associated piping/appurtenances, and associated automatic controls (I&C), modifications to various existing facilities and systems, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load. The scope also includes an upgrade to the Calaveras high voltage substation to accommodate increasing power needs brought on by the new ozonation system and various facility upgrades within the Sunol Valley and services of Technical Advisory Panels to review and provide expert opinion and recommendations during design and construction.			

**TOTAL AMOUNT \$21,500,000**

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Medical Services for Travelers, Airport Employees and Airport Tenants

Funding Source: Airport Operating Funds

PSC Amount: \$9,500,000

PSC Est. Start Date: 07/01/2024

PSC Est. End Date 06/30/2029

**1. Description of Work**

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

Contractor will be responsible for the operation, management and administration of the Medical Clinic at the San Francisco International Airport (SFO). Medical clinic services including travel medicine, urgent care and occupational health services for San Francisco International Airport (SFO) passengers, visitors, Airport Commission (Airport) employees, and employees of SFO tenants.

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

The Medical Clinic benefits the traveling public, SFO employees, employees of tenants and contractors located at SFO and surrounding businesses. Denial would negatively affect customer service and would jeopardize health and safety at SFO as the medical clinic is an integral part of SFO's Emergency Response team and the SFO Injury and Illness Prevention Programs.

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 approval was granted through PSC 44548-16/17.

D. Will the contract(s) be renewed?

Yes, if there continues to be a need at SFO.

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

not applicable

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

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

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

B. Explain the qualifying circumstances:

This work is dependent on when travelers, Airport employees, or Airport tenants need services.

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

A. Specify required skills and/or expertise: Contractor must be a state licensed medical organization. Required expertise includes clinical program management of emergency medicine, urgent care, occupational health, travel medicine, per-placement exams, and physical therapy services; administrative support including medical records retention, business/marketing plans, and billing insurance plans; and wellness education and health promotion activities.

B. Which, if any, civil service class(es) normally perform(s) this work? 1635, Health Care Billing Clerk 1; 1636, Health Care Billing Clerk 2; 1663, Patient Accounts Supervisor; 2110, Medical Records Clerk; 2246, Asst Dir



of Clinical Svcs 1; 2248, Asst Dir Clinical Svcs 2; 2302, Nursing Assistant; 2312, Licensed Vocational Nurse; 2320, Registered Nurse; 2322, Nurse Manager; 2450, Pharmacist; 2467, Diagnostic Imaging Tech I; 2468, Diagnostic Imaging Tech II; 2469, Diagnostic Imaging Tech III; 2470, Diagnostic Imaging Tech IV; 2548, Occupational Therapist; 2556, Physical Therapist;

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

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

None at this time.

**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 classifications could perform the work, operation of the medical clinic must be done by an entity licensed by the State of California to operate this type of medical facility.

- 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 civil service classifications would not be able to obtain state licensing to operate a medical clinic.

**6. Additional Information**

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

No.

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

No. No training will be provided.

- 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 12/28/2023, the Department notified the following employee organizations of this PSC/RFP request:

Management & Superv Local 21; Municipal Executive Association; Prof & Tech Eng, Local 21; SEIU Local 1021; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); Teamsters, Local 856 Health Workers

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

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

Address: PO Box 8097 San Francisco, CA 94128

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41586 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Choi, Suzanne (HRD)

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**From:** dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com  
**Sent:** Thursday, December 28, 2023 8:36 AM  
**To:** Cynthia Avakian (AIR); mleach; snaranjo@cirseiu.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; kcartermartinez@cirseiu.org; ablood@cirseiu.org; oumar.fall@seiu1021.org; cade.crowell@seiu1021.org; SF-DHR-Info@seiu1021.org; max.porter@seiu1021.org; Jason Klumb; sarah.wilson@seiu1021.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconcillo@sfgwater.org; Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David Canham; jtanner940@aol.com; sportillo@ifpte21.org; jharding@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; andrea@sfmea.com; Laxamana, Junko (DBI); Criss@sfmea.com; christina@sfmea.com; staff@sfmea.com; kdavis@ifpte21.org; mweirick@ifpte21.org; ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; l21pscreview@ifpte21.org; Cynthia Avakian (AIR); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24

RECEIPT for Union Notification for PSC 41586 - 23/24 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 41586 - 23/24 for \$9,500,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/21834> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

**From:** [XiuMin Li](#)  
**To:** [Sung Kim \(AIR\)](#)  
**Cc:** [James Maher \(AIR\)](#); [Maria Hamilton](#); [mannyhue@yahoo.com](mailto:mannyhue@yahoo.com); [noman.ten@seiu1021.org](mailto:noman.ten@seiu1021.org); [Cynthia Avakian \(AIR\)](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)  
**Subject:** RE: Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24  
**Date:** Thursday, March 7, 2024 3:09:03 PM  
**Attachments:** [image002.png](#)  
[image003.png](#)

---

Hello All,

Thanks for the background. The union is okay with this PSC for now. Thank you.

XiuMin Li (She, Her)  
Field Supervisor

Direct #: 415 848 3686  
Member Resources Center: 1-877-687-1021

Fix SF Now – SF Region Contract Campaign  
<https://fixsfnow.org/events>

**Sign up to become a Union Member! Together We Rise Up!**  
<http://join1021.org?LUID=Xli>

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

Work or intern with SEIU 1021 and help build a strong union!

<https://www.seiu1021.org/jobs>

<https://www.seiu1021.org/member-internship-program>

---

**From:** Sung Kim (AIR) <[sung.kim@flysfo.com](mailto:sung.kim@flysfo.com)>  
**Sent:** Thursday, March 7, 2024 2:58 PM  
**To:** XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>  
**Cc:** James Maher (AIR) <[james.maher@flysfo.com](mailto:james.maher@flysfo.com)>; Maria Hamilton <[Maria.Hamilton@seiu1021.org](mailto:Maria.Hamilton@seiu1021.org)>; mannyhue@yahoo.com; noman.ten@seiu1021.org; Cynthia Avakian (AIR) <[cynthia.avakian@flysfo.com](mailto:cynthia.avakian@flysfo.com)>; DHR-PSCCoordinator, DHR (HRD) <[dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)>  
**Subject:** FW: Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24

**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.

XiuMin – please see attached email from Cynthia Avakian to you dated February 22, 2024. If there is no response from SEIU by tomorrow, Friday March 8, the PSC will be scheduled for the April 1, 2024 Civil Service Commission meeting.

Thank you,

Sung



**Sung Kim**

Manager, Contracts Administration  
San Francisco International Airport | P.O. Box 8097 | San Francisco, CA 94128  
Tel 650-821-2026 | Email [sung.kim@flysfo.com](mailto:sung.kim@flysfo.com)  
(preferred pronouns: he/him/his)  
[Facebook](#) | [Twitter](#) | [YouTube](#) | [Instagram](#) | [LinkedIn](#)

---

**From:** Cynthia Avakian (AIR)  
**Sent:** Wednesday, January 31, 2024 3:11 PM  
**To:** XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>  
**Cc:** James Maher (AIR) <[james.maher@flysfo.com](mailto:james.maher@flysfo.com)>; Maria Hamilton <[Maria.Hamilton@seiu1021.org](mailto:Maria.Hamilton@seiu1021.org)>; Manuel Castro <[mannyhue@yahoo.com](mailto:mannyhue@yahoo.com)>; Norman Ten <[norman.ten@seiu1021.org](mailto:norman.ten@seiu1021.org)>; DHR-PSCCoordinator, DHR (HRD) <[dh-pescoordinator@sfgov.org](mailto:dh-pescoordinator@sfgov.org)>  
**Subject:** RE: Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24

XiuMin,

The current provider is Dignity Health doing business as St. Mary's Medical Center. Attached please find the RFP, existing original contract, modifications 1-4, and PSC approvals.

Thanks!

Take care,



**Cynthia Avakian**

---

**From:** XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>  
**Sent:** Tuesday, January 30, 2024 1:28 PM  
**To:** Cynthia Avakian (AIR) <[cynthia.avakian@flysfo.com](mailto:cynthia.avakian@flysfo.com)>  
**Cc:** James Maher (AIR) <[james.maher@flysfo.com](mailto:james.maher@flysfo.com)>; Maria Hamilton <[Maria.Hamilton@seiu1021.org](mailto:Maria.Hamilton@seiu1021.org)>; Manuel Castro <[mannyhue@yahoo.com](mailto:mannyhue@yahoo.com)>; Norman Ten <[norman.ten@seiu1021.org](mailto:norman.ten@seiu1021.org)>  
**Subject:** RE: Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24

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

Hello Cynthia,  
SEIU has concerns about this PSC.

Can you explain why this medical clinic can not be run by DPH and with city staff?  
Who's the current vendor/contractor? Please provide any RFP, contracts and invoice for services rendered, and any other documents associated with this PSC to the Union within 5 business days.

Thank you,

XiuMin Li (She, Her)

Field Supervisor

Direct #: 415 848 3686

Member Resources Center: 1-877-687-1021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Medical Services for Travelers, Airport Employees and Airport Tenants

Funding Source: Airport Operating Funds

PSC

PSC Est. Start Date:

PSC Est. End Date 06/30/2029

Amount: \$9,500,000

07/01/2024

**1. Description of Work**

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

Contractor will be responsible for the operation, management and administration of the Medical Clinic at the San Francisco International Airport (SFO). Medical clinic services including travel medicine, urgent care and occupational health services for San Francisco International Airport (SFO) passengers, visitors, Airport Commission (Airport) employees, and employees of SFO tenants.

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

The Medical Clinic benefits the traveling public, SFO employees, employees of tenants and contractors located at SFO and surrounding businesses. Denial would negatively affect customer service and would jeopardize health and safety at SFO as the medical clinic is an integral part of SFO's Emergency Response team and the SFO Injury and Illness Prevention Programs.

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 approval was granted through PSC 44548-16/17.

D. Will the contract(s) be renewed?

Yes, if there continues to be a need at SFO.

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

not applicable

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

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

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

B. Explain the qualifying circumstances:

This work is dependent on when travelers, Airport employees, or Airport tenants need services.

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

- A. Specify required skills and/or expertise: Contractor must be a state licensed medical organization. Required expertise includes clinical program management of emergency medicine, urgent care, occupational health, travel medicine, per-placement exams, and physical therapy services; administrative support including medical records retention, business/marketing plans, and billing insurance plans; and wellness education and health promotion activities.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1635, Health Care Billing Clerk 1; 1636, Health Care Billing Clerk 2; 1663, Patient Accounts Supervisor; 2110, Medical Records Clerk; 2246, Asst Dir of Clinical Svcs 1; 2248, Asst Dir Clinical Svcs 2; 2302, Nursing Assistant; 2312, Licensed Vocational Nurse; 2320, Registered Nurse; 2322, Nurse Manager; 2450, Pharmacist; 2467, Diagnostic Imaging Tech I; 2468, Diagnostic Imaging Tech II; 2469, Diagnostic Imaging Tech III; 2470, Diagnostic Imaging Tech IV; 2548, Occupational Therapist; 2556, Physical Therapist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No. Equipment will be provided by the Airport.

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

None at this time.

**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 classifications could perform the work, operation of the medical clinic must be done by an entity licensed by the State of California to operate this type of medical facility.
- 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 civil service classifications would not be able to obtain state licensing to operate a medical clinic.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
No. No training will be provided.
- 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 12/28/2023, the Department notified the following employee organizations of this PSC/RFP request:

Management & Superv Local 21; Municipal Executive Association; Prof & Tech Eng, Local 21; SEIU Local 1021; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); Teamsters, Local 856 Health Workers

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

Name: Cynthia Avakian Phone: 650-821-2014 Email: [cynthia.avakian@flysfso.com](mailto:cynthia.avakian@flysfso.com)

Address: PO Box 8097 San Francisco, CA 94128

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41586 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Sign up to become a Union Member! Together We Rise Up!

[https://url.avanan.click/v2/\\_\\_\\_http://join1021.org?LUID=Xli\\_\\_\\_YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjVhNTE6NzU3JlMmI0NjcyMjY3ZDkyMTUwZjZlYmM2ZmM3MjE0ZTA0MDMxNTA2OWRiNWJiYWNiNGEYOGlyZWJmNGI2NzQ1NjU0OjY](https://url.avanan.click/v2/___http://join1021.org?LUID=Xli___YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjVhNTE6NzU3JlMmI0NjcyMjY3ZDkyMTUwZjZlYmM2ZmM3MjE0ZTA0MDMxNTA2OWRiNWJiYWNiNGEYOGlyZWJmNGI2NzQ1NjU0OjY)

Join the citywide contract campaign kick off rally: [https://url.avanan.click/v2/\\_\\_\\_https://www.seiu1021.org/sf-kickoff\\_\\_\\_YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjVhNTE6NzU3JlMmU2YTJkZTlzMtQyY2E1YzE0ZDZlNTRjOGU4YzdlOTJhZmQ4NzgxMwVhNDc3YzRiOTQyNTE5ZjUzYTVhODp0OjY](https://url.avanan.click/v2/___https://www.seiu1021.org/sf-kickoff___YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjVhNTE6NzU3JlMmU2YTJkZTlzMtQyY2E1YzE0ZDZlNTRjOGU4YzdlOTJhZmQ4NzgxMwVhNDc3YzRiOTQyNTE5ZjUzYTVhODp0OjY)

Sign up for text updates from the union. [https://url.avanan.click/v2/\\_\\_\\_https://www.seiu1021.org/text-me\\_\\_\\_YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjgyMGE6ODU5YTZlODM2N2Y0NmM2ODVhYThjY2U1MzFkNTIzYzliYTQ3YjAxODI4MTIIZjE0NTU1ZmExM2NIN2Q4NDQ5YTp0OjY](https://url.avanan.click/v2/___https://www.seiu1021.org/text-me___YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjgyMGE6ODU5YTZlODM2N2Y0NmM2ODVhYThjY2U1MzFkNTIzYzliYTQ3YjAxODI4MTIIZjE0NTU1ZmExM2NIN2Q4NDQ5YTp0OjY)

Work or intern with SEIU 1021 and help build a strong union!

[https://url.avanan.click/v2/\\_\\_\\_https://www.seiu1021.org/jobs\\_\\_\\_YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjRlMmU6M2QwZDE5OWYwNDI4NTEzODVhYjRmZDA3ZjU5YWEyM2FmNGNhZTgWYjhhNDM5MjhmYWY5OTZlMzlwMzBIMTI5YzU0OjY](https://url.avanan.click/v2/___https://www.seiu1021.org/jobs___YXAzOnNmZHQyOmE6bzowNjY3NTYxY2Q2MjQ0ZTUyYzE1YjdkMGQ2ZWM3YWQ4Yjo2OjRlMmU6M2QwZDE5OWYwNDI4NTEzODVhYjRmZDA3ZjU5YWEyM2FmNGNhZTgWYjhhNDM5MjhmYWY5OTZlMzlwMzBIMTI5YzU0OjY)

<https://www.seiu1021.org/member-internship-program>

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

From: [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) <[dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)> On Behalf Of [cynthia.avakian@flysfso.com](mailto:cynthia.avakian@flysfso.com)

Sent: Thursday, December 28, 2023 8:36 AM

To: [cynthia.avakian@flysfso.com](mailto:cynthia.avakian@flysfso.com); [mleach@ibt856.org](mailto:mleach@ibt856.org); [snaranjo@cirseiu.org](mailto:snaranjo@cirseiu.org); [jennifer.esteen@seiu1021.org](mailto:jennifer.esteen@seiu1021.org); [emathurin@cirseiu.org](mailto:emathurin@cirseiu.org); [abush@cirseiu.org](mailto:abush@cirseiu.org); [kcartermartinez@cirseiu.org](mailto:kcartermartinez@cirseiu.org); [ablood@cirseiu.org](mailto:ablood@cirseiu.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); Cade Crowell <[Cade.Crowell@seiu1021.org](mailto:Cade.Crowell@seiu1021.org)>; DHR Info <[SF-DHR-Info@seiu1021.org](mailto:SF-DHR-Info@seiu1021.org)>; [max.porter@seiu1021.org](mailto:max.porter@seiu1021.org); [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org); Sarah Wilson <[Sarah.Wilson@seiu1021.org](mailto:Sarah.Wilson@seiu1021.org)>; Thomas Vitale <[Thomas.Vitale@seiu1021.org](mailto:Thomas.Vitale@seiu1021.org)>; [Ricardo.lopez@sfgov.org](mailto:Ricardo.lopez@sfgov.org); [kbasconcillo@sfgov.org](mailto:kbasconcillo@sfgov.org); [Sandeep.lal@seiu1021.me](mailto:Sandeep.lal@seiu1021.me); [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net); Wendy Frigillana <[wendy.frigillana@seiu1021.org](mailto:wendy.frigillana@seiu1021.org)>; PSCreview <[PSCreview@seiu1021.org](mailto:PSCreview@seiu1021.org)>; [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [leah.berlanga@seiu1021.org](mailto:leah.berlanga@seiu1021.org); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>; [Sin.Yee.Poon@sfgov.org](mailto:Sin.Yee.Poon@sfgov.org); David Canham <[david.canham@seiu1021.org](mailto:david.canham@seiu1021.org)>; [jtanner940@aol.com](mailto:jtanner940@aol.com); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [andrea@sfmea.com](mailto:andrea@sfmea.com); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [Criss@sfmea.com](mailto:Criss@sfmea.com); [Christina@sfmea.com](mailto:Christina@sfmea.com); [staff@sfmea.com](mailto:staff@sfmea.com); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [cynthia.avakian@flysfso.com](mailto:cynthia.avakian@flysfso.com); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)

Subject: Receipt of Notice for new PCS over \$100K PSC # 41586 - 23/24

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.

RECEIPT for Union Notification for PSC 41586 - 23/24 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 41586 - 23/24 for \$9,500,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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:

<https://nam10.safelinks.protection.outlook.com/?url=http%3A%2F%2Fapps.sfgov.org%2Fdhrdrupal%2Fnode%2F21834&data=05%7C02%7C%7C9c813b7dd8d24d808a9708dc07c41761%7Ce35c5b2684f74b9ba7c591278c732568%7C0%7C0%7C638393786073049995%7CUnknown%7CTWFpbGZsb3d8eyJWljojMC4wLjAwMDAilCJQljoiv2luMzliLjBtIl6k1haWwiLCJXVCi6Mn0%3D%7C3000%7C%7C%7C&sdata=genTGqJIXv8A5iAUI2AwsyEnRzQ4YgSV2cr%2Bu6xlCrs%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)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION

Dept. Code: AIR

Type of Request:  Initial  Modification of an existing PSC (PSC # 44548 - 16/17)

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

Type of Service: Medical Services for Travelers, Airport Employees and Airport Tenants

Funding Source: Airport Operating Funds

PSC Original Approved Amount: \$9,500,000

PSC Original Approved Duration: 06/01/17 - 12/31/24 (7 years 30 weeks)

PSC Mod#1 Amount: \$4,750,000

PSC Mod#1 Duration: 12/31/24-06/30/25 (25 weeks 5 days)

PSC Mod#2 Amount: \$3,200,000

PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$17,450,000

PSC Cumulative Duration Proposed: 8 years 4 weeks

**1. Description of Work**

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

Contractor will be responsible for operation, management and administration of the Medical Clinic at the San Francisco International Airport (SFO). Medical clinic services including travel medicine, urgent care and occupational health services for San Francisco International Airport (SFO) passengers, visitors, Airport Commission (Airport) employees, and employees of SFO tenants.

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

The Medical Clinic benefits the traveling public, SFO employees, employees of tenants and contractors located at SFO and surrounding businesses. Denial would negatively affect customer service and would jeopardize health and safety at SFO as the medical clinic is an integral part of SFO's Emergency Response team and the SFO Injury and Illness Prevention Programs.

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.

PSC 44548-16/17

D. Will the contract(s) be renewed?

Yes, if there continues to be a need at SFO.

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 remains the same.

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

A. Display all that apply

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.

Explain the qualifying circumstances:

Operation of the medical clinic must be provided by an entity licensed by the State of California to operate this type of medical facility. The Medical Board of California's requirement to open a medical clinic can be found here through the following link:

[http://www.mbc.ca.gov/Consumers/Complaints/Complaints\\_FAQ/Practices\\_and\\_Protocols\\_FAQ.aspx](http://www.mbc.ca.gov/Consumers/Complaints/Complaints_FAQ/Practices_and_Protocols_FAQ.aspx)

B. Reason for the request for modification:

Need to increase the compensation for the 2-year extension.

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

A. Specify required skills and/or expertise: Contractor must be a state licensed medical organization. Expertise required include clinical program management of emergency medicine, urgent care, occupational health, travel medicine, per-placement exams, and physical therapy services; administrative support including medical records retention, business/marketing plans, and billing insurance plans; and wellness education and health promotion activities.

B. Which, if any, civil service class(es) normally perform(s) this work? 1635, Health Care Billing Clerk 1; 1636, Health Care Billing Clerk 2; 1662, Patient Accounts Asst Sprv; 1663, Patient Accounts Supervisor; 2110, Medical Records Clerk; 2246, Asst Dir of Clinical Svcs 1; 2248, Asst Dir Clinical Svcs 2; 2302, Nursing Assistant; 2312, Licensed Vocational Nurse; 2320, Registered Nurse; 2322, Nurse Manager; 2450, Pharmacist; 2467, Diagnostic Imaging Tech I; 2468, Diagnostic Imaging Tech II; 2469, Diagnostic Imaging Tech III; 2470, Diagnostic Imaging Tech IV; 2548, Occupational Therapist; 2556, Physical Therapist;

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

### **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 classifications could perform the work, operation of the medical clinic must be done by an entity licensed by the State of California to operate this type of medical facility.

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 civil service classifications would not be able to obtain state licensing to operate a medical clinic.

**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.  
None, as the clinic must be operated by a State of California licensed entity.
- 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, Dignity Health dba St. Mary's Medical Center

**7. Union Notification:** On 01/19/22, the Department notified the following employee organizations of this PSC/RFP request:

Teamsters, Local 856 Health Workers; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); SEIU Local 1021; Municipal Executive Association; 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: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: PO Box 8097, San Francisco, CA 94128

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44548 - 16/17

DHR Analysis/Recommendation:

04/18/2022

Commission Approval Required

Approved by Civil Service Commission

04/18/2022 DHR Approved for 04/18/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR

Dept. Code: AIR

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

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

Type of Service: Towing of Transit Buses

Funding Source: Airport Operating Funds

PSC Amount: \$400,000

PSC Est. Start Date: 04/01/2024

PSC Est. End Date 03/31/2025

**1. Description of Work**

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

Contractor will provide transport of 14 buses from Phoenix Sky Harbor (PHX) Airport to San Francisco International Airport (SFO). The 14 buses are considered inoperable as they have not had any maintenance done in over 14 months. Seven of the buses are known to need mechanical repairs that prevent them from operating under their own power.

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

These buses are being purchased at a significant discount from PHX to meet the operational needs of SFO's shuttle service. Once these buses are purchased, they need to be transported to SFO so they can be inspected, maintained, and placed in service. If we are unable to transport them to SFO we will be unable to meet operational needs which will result in reduced revenue and rental fees for buses.

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

This is a new service.

D. Will the contract(s) be renewed?

No, not at this time.

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

not applicable

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

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

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

B. Explain the qualifying circumstances:

Contractor will provide specialty equipment needed to transport transit buses and obtain any applicable weight permits related to the transporting of heavy loads over Arizona, Nevada, and California public roads.

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

A. Specify required skills and/or expertise: The required expertise requires extensive training and equipment in order for services to be performed safely to transport transit buses and obtain any applicable weight permits related to the transporting of heavy loads over Arizona, Nevada, and California public roads.

- B. Which, if any, civil service class(es) normally perform(s) this work? 7410, Automotive Service Worker;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
Yes, Contractor will provide specialty equipment needed to transport transit buses and obtain any applicable weight permits related to the transporting of heavy loads over Arizona, Nevada, and California public roads.

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

SFO Fleet Services has not found the correct equipment needed to perform such towing within the City fleet.

**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 classification that is designated to tow transit buses over long distances and across state lines. Class 7410 does perform some towing responsibilities but is limited to regular vehicle towing and not transit buses.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it would not be practical to adopt a new civil service class to perform this work, this is a one-off circumstance that this task is needed for.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
No. No training will be provided
- 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 02/01/2024, the Department notified the following employee organizations of this PSC/RFP request:  
TWU - Automotive Service Worker; TWU Local 250A**

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

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

Address: PO Box 8097 San Francisco, CA 94128



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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45154 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Cynthia Avakian (AIR)

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**From:** dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfso.com  
**Sent:** Thursday, February 1, 2024 5:07 PM  
**To:** Cynthia Avakian (AIR); mdennis@twusf.org; roger marengo; pwilson@twusf.org; Cynthia Avakian (AIR); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 45154 - 23/24

RECEIPT for Union Notification for PSC 45154 - 23/24 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 45154 - 23/24 for \$400,000 for Initial Request services for the period 04/01/2024 – 03/31/2025. 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/22008> 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 - 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: Security patrol services

Funding Source: TIDA departmental budget

PSC Duration: 7 years 1 day

PSC Amount: \$.5,600,000

**1. Description of Work**

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

Unarmed private security patrol of Treasure Island Development Authority (TIDA) owned and managed buildings, grounds and common areas on Treasure and Yerba Buena Islands, on a 24/7/365 basis with one or two patrol officers on duty at all times. Vendor will patrol public buildings and grounds to safeguard property against damage, hazardous situations, or unauthorized entry. Security patrol service will ensure the security of critical TIDA-owned properties and support TIDA in maintaining a safe environment on Treasure and Yerba Buena Islands through securing unoccupied/abandoned TIDA-owned buildings, performing regular mobile patrol/observe/report of Treasure Island residential housing and high-traffic public areas of the Islands, serving as visible public ambassadors providing directions to visitors, managing residential parking programs on behalf of Treasure Island housing manager agencies

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

Services are currently performed by the firm that manages market rate rental housing on Treasure Island (TI). They are not able to continue to provide this service. Without continuation of private security patrol of buildings and grounds, the potential exists for increase of intrusions into abandoned properties on TI, including those adjacent to currently occupied properties. Additionally, Treasure Island's residential property manager agencies would contend with increased potential for unpermitted parking and vehicle abandonment in TI residential neighborhood if parking permit program is not enforced.

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

These services have been provided by a firm that manages residential housing on TI.

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 Treasure Island Development Authority (TIDA) plans for an original contract term of three years, with two TIDA-held options to extend of two years each extension, for a total of seven years. This original contract term will ensure the security of critical TIDA-owned properties and support TIDA in maintaining a safe environment on Treasure and Yerba Buena Islands through securing unoccupied/abandoned TIDA-owned buildings, performing regular mobile patrol/observe/report of Treasure Island residential housing and high-traffic public areas of the Islands, serving as visible public ambassadors providing directions to visitors, managing residential parking programs on behalf of Treasure Island housing manager agencies during the next three years at minimum. The contract only extends beyond five years if TIDA chooses to exercise both extensions.

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

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

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

B. Explain the qualifying circumstances:

The scope of services is very limited and short term. The TIDA Board is currently engaged in long term operations planning which will further guide long-term staffing models for performing labor on the island.

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

A. Specify required skills and/or expertise: Selected contractor must be registered Private Patrol Officer in current good standing with the State of California, all employees performing services on behalf of contractor required to register as a Security Guard with State of California.

B. Which, if any, civil service class(es) normally perform(s) this work? 8202, Security Guard; 8207, Bldg & Grounds Patrol Officer;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor provides the uniforms, equipment and vehicles utilized by their personnel to perform the Scope of Services.

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

It is our understanding there are no departments that offer private patrol services under work order to other City Departments. This was indicated in the responses we received to a Request for Proposal (RFP) we issued for these servicers. Additionally, TIDA has reviewed the existing Citywide Term Contract for unarmed security patrol with the Office of Contract Administration (OCA). That scope does not include/allow for mobile patrols, which is critical to security patrol of the geographic extent of both islands.

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

A. Explain why civil service classes are not applicable.

Services are of a very limited scale. The TIDA Scope requires only one or two patrol officers at all times over the course of a 24-hour day, 7 days a week year-round. The staffing level necessary is not commensurate with individual hiring capacity necessary to staff this position internally including sick/vacation leave, supervision as well as vehicles.

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 staffing level necessary is not commensurate with individual hiring capacity necessary to staff this position internally with city employees, including sick/vacation leave, supervision and as well as providing patrol vehicles.

**6. Additional Information**

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

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

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

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

**7. Union Notification:** On 12/23/2023, the Department notified the following employee organizations of this PSC/RFP request:  
SEIU Local 1021

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

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place Room 362 San Francisco, CA 94012

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49784 - 23/24

DHR Analysis/Recommendation:  
Commission Approval Required  
DHR Approved for 04/01/2024

Civil Service Commission Action:

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

**From:** [dhrrpscordinator@sfgov.org](mailto:dhrrpscordinator@sfgov.org) on behalf of [joan.lubamersky@sfgov.org](mailto:joan.lubamersky@sfgov.org)  
**To:** [Lubamersky, Joan \(ADM\); oumar.fall@seiu1021.org; cade.crowell@seiu1021.org; SF-DHR-Info@seiu1021.org; max.porter@seiu1021.org; Jason Klumb; Laxamana, Junko \(DBI\); sarah.wilson@seiu1021.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconillo@sfwater.org; Sandeep.lal@seiu1021.me; pcamarillo\\_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David Canham; jtanner940@aol.com; Lubamersky, Joan \(ADM\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Lubamersky,Joan(ADM);oumar.fall@seiu1021.org;cade.crowell@seiu1021.org;SF-DHR-Info@seiu1021.org;max.porter@seiu1021.org;Jason.Klumb;Laxamana,Junko(DBI);sarah.wilson@seiu1021.org;Thomas.Vitale;Ricardo.lopez@sfgov.org;Kbasconillo@sfwater.org;Sandeep.lal@seiu1021.me;pcamarillo_seiu@sbcglobal.net;Wendy.Frigillana;pscreview@seiu1021.org;ted.zarzecki@seiu1021.net;leah.berlanga@seiu1021.org;davidmkersten@gmail.com;XiuMin.Li;Sin.Yee.Poon@sfgov.org;David.Canham;jtanner940@aol.com;Lubamersky,Joan(ADM);DHR-PSCCoordinator,DHR(HRD)@seiu1021.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 49784 - 23/24  
**Date:** Saturday, December 23, 2023 4:50:11 PM

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RECEIPT for Union Notification for PSC 49784 - 23/24 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 49784 - 23/24 for \$5,600,000 for Initial Request services for the period 02/01/2024 – 01/31/2031. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/21805> 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: 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: Data & Evaluation Services

Funding Source: Mixed Funds

PSC Amount: \$10,000,000

PSC Est. Start Date: 07/01/2024

PSC Est. End Date 06/30/2029

**1. Description of Work**

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

DEC is seeking to partner with external experts for four distinct service areas for the early care and education field:

- 1) Data Mapping and Data Governance for better utilization, tracking, and reporting of information coming into the Department of Early Childhood (DEC);
- 2) High quality Evaluation Implementation for six critical early childhood initiative program areas within the DEC;
- 3) Landscape Analysis to understand the broader context DEC operates within; and
- 4) Data Systems Development and Systems Project Management for identifying database and data system needs and advising on software development.

Services will include: 1) connecting and standardizing multiple data sources into a cohesive framework to aid evaluation, while also supporting the further development and refining of the data at DEC; 2) formative, process, and outcome evaluation efforts; 3) yearly needs assessment of San Francisco families; 4) supporting the development and management of data systems technology.

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

The service is necessary because the Department of Early Childhood needs to be able to understand programmatic impact and engage in continuous quality improvement of its core activities in the early care and education field. These data and evaluation efforts will allow the department to build tracking ability to accurately measure and ensure quality, outcomes, and experiences that are the result of the required programming across our city funded system of over 400 center based and family child care programs. As designated in Article 23, Section 2A.310 b., the Department of Early Childhood is charged with "Establishing a universal system for high quality early learning care and education, strengthening the early care and education workforce, and building early care and education system capacity.". Without these services, we would not have the ability to fulfill this charter and track our progress to this goal.

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

This is a new service and was not previously provided in the past.

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

Yes, based on 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.

The professional services requested involve complex and interconnected elements of work in the early care and education field that will progress and build to position Department of Early Childhood (DEC) to best assess and address programmatic needs, respond to our legislative charter, and gain understanding of longitudinal impact. The timeframe will also provide the department with the opportunity to support adoption of new systems and provide an appropriate runway for scaling up activities according to capacity.

**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.

Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

B. Explain the qualifying circumstances:

The existing team does not have capacity or expertise to provide the breadth of services requested. It also requires the development of data systems that are not currently available or fitting the needs of the data and evaluation efforts. For accountability and credibility purposes, program evaluation typically requires a degree of independence from operations. In this case, the department could be seen as having a conflict of interest if it was to self-evaluate the effectiveness of its programs and services.

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

A. Specify required skills and/or expertise: Expertise in one or more content areas: early childhood education, workforce development (with an emphasis on the early childhood teaching profession), early mental health, intervention and child development areas. Expertise in activities including: evaluation, project management, data management, data collection, community engagement, analytic skills.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No, the proposed scope pertains primarily to professional 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.

There are no civil service classifications that specialize in conducting comprehensive program evaluation work. In limited cases, the 1823 Senior Administrative Analyst or 1824 Principal Administrative Analyst might be charged with overseeing evaluation activities and managing evaluation contracts, but not likely be the persons who would actually design the evaluation methodologies, carry out data collection from subjects in the field, or write the comprehensive reports on findings. We are not aware of any classifications that are primarily responsible for managing multiple data system development projects with external engineers and serving as a liaison between City program administrators and software engineers.

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 evaluation efforts will provide “point in time” data that will help inform the further development and progress of programmatic efforts. The data governance and software support will be transitioned to the existing team to maintain indefinitely.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Yes. Yes. The contractor will provide documented data policies and protocols and will work with DEC staff and external grantees to support and guide any shifts or modifications in that data governance. Additionally, a contractor will manage the rollout and adoption of data systems software and support training and onboarding to the tool.
- 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 02/02/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Matthew Ahn Phone: 6286523063 Email: MAhn@sfgov.org

Address: 1650 Mission Street, Suite 312 San Francisco, CA, 94103

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45432 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [MAhn@sfgov.org](mailto:MAhn@sfgov.org)  
**To:** [Ahn, Matthew \(DEC\); Laxamana, Junko \(DBI\); sportillo@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; 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; Ahn, Matthew \(DEC\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Ahn, Matthew (DEC); Laxamana, Junko (DBI); sportillo@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; 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; Ahn, Matthew (DEC); DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 45432 - 23/24  
**Date:** Friday, February 2, 2024 10:09:28 AM

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RECEIPT for Union Notification for PSC 45432 - 23/24 more than \$100k

The Department of Early Childhood -- DEC has submitted a request for a Personal Services Contract (PSC) 45432 - 23/24 for \$10,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/21996> 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: 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: Overhaul of Brake System Components for LRV4 Phase 1 Vehicles

Funding Source: Operating Funds

PSC Duration: 2 years 26 weeks

PSC Amount: \$20,000,000

**1. Description of Work**

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

The scope of this project is to purchase roughly \$14.5M of custom manufactured brake parts required for the Light Rail Vehicles (LRV4) proprietary brake system then also perform roughly \$6M of professional overhaul services for a planned overhaul program in accordance with recommended maintenance interval established by the manufacturer.

This overhaul will be for the hydraulic brake systems on 68 Phase 1 Siemens LRV4 light rail vehicles for the San Francisco Municipal Transportation Agency. This overhaul conforms to the scheduled maintenance recommended by the Brakes Manufacturer. Maintenance intervals on the brakes system are every 6 years. This will be the first major system overhaul on LRV4 vehicles, the oldest of which are coming out of their 5-year base warranty period. Performing this overhaul is in keeping with SFMTA's commitment to remain up-to-date on scheduled maintenance to maximize life and minimize lifecycle costs for the LRV4 fleet.

The overhaul program includes brakes subsystems including the Hydraulic Power Unit (HPU), Accumulator, and Brake Discs. Motor Truck (MT) calipers and Center Truck (CT) calipers in this overhaul program will be included in the necessary standard overhaul activities as well as upgrading parts (to improve reliability and address known warranty issues) to optimize the performance of these products.

\$14.5M of this project will be used for the purchase of proprietary custom-manufactured parts. The parts are to be sold as a packaged overhaul kit as part of this contract. In delivering the overhaul, the Contractor shall provide all parts, materials, tools, labor, inspections, facilities, and equipment required to complete this work, which includes removal and replacement (R&R) of the brake system, shipment of the system to the site of original manufacture in Duncan, South Carolina, disassembly of the existing brakes systems, disposal of used parts, cleaning, inspecting for wear and damage, overhaul and remanufacture to original specifications, quality inspection, shipping back to San Francisco Municipal Transportation Agency (SFMTA), and putting the brake systems back on the LRV4 fleet.

All rehabilitation work will be performed off-site, as the work requires a clean room with specialized production equipment. The Contractor shall provide a Field Services team to execute on-train services.

Because the contractor is also the original manufacturer, and because the manufacturer is supplying all parts, and because the manufacturer is performing the overhaul rebuild, the Contractor will provide a three-year warranty on all rebuilt components.

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

The proper functioning of the brakes systems listed above is critical to provide reliable service. Manufacturer recommendations and industry standards require brake overhaul every six years. The current Phase 1 LRV4 fleet has been in service for almost 6 years and is scheduled to receive this planned overhaul. Replacing and rehabilitating these systems will bring the light rail vehicles into a state of good repair, thereby increasing vehicle reliability and improving service levels. Furthermore, it will reduce unscheduled maintenance and repair costs. It is necessary to purchase custom manufactured parts – which constitute the majority of the cost of this project – from the original manufacturer. This is necessary not only to ensure compatible operations, but to maintain warranty protection with the original manufacturer. Denial of this request would result in SFMTA not using manufacturer approved parts, and not using the original manufacturer for rebuild and therefore not extending the brake system warranty for another 3 years. In addition, denial could result in delaying or missing the scheduled 6-year brakes overhaul. Missing this important planned maintenance puts the system at risk of failure and decreases reliability of the brakes system. Note that the brakes systems are designed to “fail safe.” This means that brakes that fail to perform properly in service will engage and stop the train and not create a hazard. However, missing this planned brakes overhaul will have a negative impact on the condition and service reliability of the vehicles and on SFMTA's operating budget due to an increase in unplanned maintenance work, potential overtime needed, and unbudgeted parts purchases.

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.

There has been no previous overhaul services for the LRV4 brake systems. This is the first scheduled overhaul for the LRV4 brake systems which were acquired with the new LRV4 vehicles delivered between 2017 and 2020. The previous light rail vehicles which are being replaced by the LRV4 vehicles did not undergo regular overhauls of the brake system. The brakes did not undergo regular overhauls. Instead, the brake systems were maintained when they failed, resulting in high failure rates and high maintenance costs. Performing planned maintenance of major systems according to the manufacturers recommended service intervals is a hallmark of the new LRV4 vehicle program and is intended to reduce total lifecycle costs.

D. Will the contract(s) be renewed?

No

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

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

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

The scope of the project exceeds available resources and facilities.

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

- A. Specify required skills and/or expertise: The skills and/or expertise required to manufacture custom parts for brake systems are not available in any job classification within the City. San Francisco does not run manufacturing plants, especially those in highly specialized rail vehicle brake systems. The skills and expertise required to perform the overhaul work include the skills possessed by 7371 Electrical Transit System Mechanic and 7332 Maintenance Machinist. However, these classifications do not have the specialized knowledge and experience of rail system brakes. Nor do these classifications have access to specialized brake production facilities, including a clean room, where the brakes could be remanufactured.
- B. Which, if any, civil service class(es) normally perform(s) this work? 7332, Maintenance Machinist; 7371, Electrical Transit System Mechanic;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The Contractor will use their facility for all project work. All rehabilitation work will be performed off-site, as the work requires a clean room with specialized production equipment and highly trained experienced staff. Contractor shall provide a Field Services team to execute on-train services related to remove and install parts on all units for overhaul. SFMTA does not have the necessary facility space, certified mechanics or tools to perform this brakes overhaul project of this scale in-house.

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

The specialized service of rail brake overhaul does not exist with the City. No efforts have been made to initiate custom production of the parts required for this rebuild because it is not feasible for the City to build a clean room facility to perform overhauls and train specialized staff to work on an overhaul project that takes place once every six years. No efforts have been made to source near-equivalent parts for this overhaul because those parts would not be warranted by the manufacturer. The skills and expertise required for the brake system overhaul are highly specialized and are used once every six years. The work described exceeds the availability of in-house staff as SFMTA is unable to hire enough 7332 to fill current job openings. SFMTA also lacks the resources, facility space and required parts, materials, and supplies to perform this work at the required level as SFMTA do not have a clean room to perform the overhauls and do not have the resources to invest in infrastructure for overhauls that will be used once every six years. SFMTA personnel will not be able to warranty any of the parts used for the overhaul. This type of work can be done more effectively and efficiently by a company that has performed this type of work before and has the facilities, workforce and tools necessary to do the work in the most cost effective, timely manner.

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

- A. Explain why civil service classes are not applicable.  
Due to the variety and scale of the project work, as well as the urgency to expedite the LRV component upgrades and rebuilds, there is a need to outsource this work in order to complete the project in a timely fashion. The work described exceeds the availability of in-house staff and the SFMTA lacks the resources, facility space and required parts and materials supplies to perform this work at the required level. Potential vendors have the capacity to do the overhaul work on a much larger scale, in a timelier fashion, and on an assembly-line basis. In addition, civil service hiring timelines are incompatible with project timeframes.
- 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. Civil service classes exist to perform this work, but as explained above, the scope of the project exceeds available resources. This type of work can be done more effectively and efficiently by a company that has performed this type of work before and has the facilities, workforce and tools necessary to do the work in the most cost effective, timely manner. The brake rebuild work is not continuous or permanent. It is periodic and would not support full-time employment.



**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 is not needed. SFMTA does not have the staff resources and facilities to support the scope of this project in order to perform the work in-house.
- 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 02/02/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Automotive Machinists, Local 1414; Electrical Workers, Local 6

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, 6th Floor San Francisco, CA 94103

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40625 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Nuque, Amy

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**From:** dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com  
**Sent:** Friday, February 2, 2024 3:43 PM  
**To:** Nuque, Amy; oashworth@ibew6.org; dvickers@iam1414.org; Mjayne@iam1414.org; agonzalez@iam1414.org; speedy4864@aol.com; Nuque, Amy; dhr-psccordinator@sfgov.org  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 40625 - 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 40625 - 23/24 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a request for a Personal Services Contract (PSC) 40625 - 23/24 for \$20,000,000 for Initial Request services for the period 04/01/2024 – 09/30/2026. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/22013> 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: PORT -- PRT

Dept. Code: PRT

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

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

Type of Service: Psychological Training coaching

Funding Source: Port Operating Budget

PSC Duration: 2 years

PSC Amount: \$190,000

**1. Description of Work**

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

The Port is interested in entering in one or more contracts for training and coaching on psychological training on an on-going basis for 2 years. The general scope of work would include training and coaching at several levels of the organization: executive team, managers, and supervisors (approximately 65 -75 employees). The Port has a total of 258 employees and are divided in the following divisions: Engineering, Environmental and Planning, Real Estate, Finance and Administration, Maintenance, Maritime. The awardee(s) will work with leadership from each of the above-mentioned divisions.

Project Outcomes:

Below are the expected outcomes from this project:

Port supervisors, managers and executive team understand and can fluently discuss and explain the concept of psychological safety.

Measure how psychologically safe our workplace is currently.

Identify what might be hindering psychological safety in our teams/divisions.

Create actions to help us build a psychologically safe workplace that include training and coaching.

The Port understands psychological safety to be the condition in which you feel (1) included, (2) safe to learn, (3) safe to contribute, and (4) safe to challenge the status quo – all without fear of being embarrassed, marginalized, or punished in some way.

B. Explain why this service is necessary and the consequence of denial:  
To make assessments of teams/divisions and the Port as a workplace overall as it relates to psychological safety, and to create actions, trainings and coaching of supervisors, managers and executive team members to improve the psychological safety of at the Port. Without this training, the Port will not realize its goals of an equitable and safe workplace.

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

This is a new service that previously was not provided to the department.

D. Will the contract(s) be renewed?

There is no intention of renewing the 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.

not applicable

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

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

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

B. Explain the qualifying circumstances:

These services are not required on a short-term and less than fulltime basis.

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

A. Specify required skills and/or expertise: Any individual or entity interested in providing this work must have extensive experience in training and coaching and assessing group psychological safety to executive leadership and management. The individual must have an existing, proven training curriculum that includes learning outcomes and a timeline.

B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1244, Senior Personnel Analyst; 1244, Senior Human Resources Analyst;

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

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

The Port has reviewed the training available within the City.

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

A. Explain why civil service classes are not applicable.

The current civil service classes are not able to provide the full assessment, build a training program off the assessment, and individualize training to the divisions and managers.

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. There is insufficient work to adopt a new civil service class for this work.

## 6. **Additional Information**

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

**7. Union Notification:** On 10/18/2023, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Management & Superv Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Alysabeth Alexander-Tut Phone: 415-274-0558 Email: alysabeth.alexander-tut@sfport.com

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 45046 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Receipt of Notice for new PCS over \$100K PSC # 45046 - 23/24

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

on behalf of

alysabeth.alexander-tut@sfport.com <alysabeth.alexander-tut@sfport.com>

Wed 10/18/2023 1:28 PM

To: Alexander Tut, Alysabeth (PRT) <alysabeth.alexander-tut@sfport.com>;Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>;sportillo@ifpte21.org <sportillo@ifpte21.org>;agarza@ifpte21.org <agarza@ifpte21.org>;amakayan@ifpte21.org <amakayan@ifpte21.org>;kdavis@ifpte21.org <kdavis@ifpte21.org>;jharding@ifpte21.org <jharding@ifpte21.org>;mweirick@ifpte21.org <mweirick@ifpte21.org>;dho@ifpte21.org <dho@ifpte21.org>;ewallace@ifpte21.org <ewallace@ifpte21.org>;ecassidy@ifpte21.com <ecassidy@ifpte21.com>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;tmathews@ifpte21.org <tmathews@ifpte21.org>;kschumacher@ifpte21.org <kschumacher@ifpte21.org>;kpage@ifpte21.org <kpage@ifpte21.org>;eerbach@ifpte21.org <eerbach@ifpte21.org>;l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>;Alexander Tut, Alysabeth (PRT) <alysabeth.alexander-tut@sfport.com>;DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

RECEIPT for Union Notification for PSC 45046 - 23/24 more than \$100k

The PORT -- PRT has submitted a request for a Personal Services Contract (PSC)

45046 - 23/24 for \$190,000 for Initial Request services for the period 12/01/2023 – 11/30/2025. 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/21567> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions

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

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



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Interoperable Neuromonitoring Services

Funding Source: General Funds

PSC Duration: 5 years

PSC Amount: \$.5,000,000

**1. Description of Work**

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

The contractor will provide a neurophysiologist or neurophysiology technologist with a specialization in the fields of neurophysiological monitoring performing many tests that help diagnose brain and nervous system functions. Tests and procedures they perform include electroencephalograms (EEGs) and electromyography (EMG) that are used to assess brain activity.

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

These specialized services are necessary in order to provide the needed care to patients that is not available at Zuckerberg San Francisco General Hospital (ZSFGH). Denial of services will seriously jeopardize the Department's ability to serve patients, putting the patients and Department of Public Health's accreditation and licensing at risk.

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 41467-14/15.

D. Will the contract(s) be renewed?

Yes, if the need for these services 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).

B. Explain the qualifying circumstances:

These services are highly specialized medical services not provided at ZSFGH to help diagnose brain and nervous system functions.

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

A. Specify required skills and/or expertise: All neurophysiologists provided under contract are either Certification for Neurophysiological Intraoperative Monitoring (CNIM) certified and/or Diplomate of the American Board of Neurophysiologic Monitoring (DABNM) certified. For a clinical neurophysiologist, a person must complete four years of premedical education at a college or university, resulting in a

bachelor's degree and four years of medical school, resulting in a Doctor of Medicine (MD) or Doctor of Osteopathic Medicine (DO).

- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
Yes, contractor will supply own equipment and consumable items not currently provided by the City.

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

Since the services are highly specialized and there is no existing civil service class for neurophysiologist or neurophysiology technologist with a specialization in the fields of neurophysiological monitoring, sourcing from within existing classes is not feasible.

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

- A. Explain why civil service classes are not applicable.  
It would be impractical to maintain civil service staff to cover these specialized neurophysiologist technologists, as the services are only utilized on an as-needed basis.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. As these services are relatively low volume, and used only on an as needed basis, it would be impractical to establish new classes for these types of services.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. There is no training component.
- 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 02/14/2024, 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: Reanna Albert Phone: 628-271-6178 Email: reanna.albert@sfdph.org

Address: 1380 Howard St, SF CA San Francisco, CA

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41513 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Receipt of Notice for new PCS over \$100K PSC # 41513 - 23/24

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

on behalf of

reanna.albert@sfdph.org <reanna.albert@sfdph.org>

Wed 2/14/2024 12:23 PM

To: Albert, Reanna (DPH) <reanna.albert@sfdph.org>; kristin.hardy@seiu1021.org <kristin.hardy@seiu1021.org>; Chanel.Brown@seiu1021.org <Chanel.Brown@seiu1021.org>; Chanel.Brown@seiu1021.org <Chanel.Brown@seiu1021.org>; jnuti@ifpte21.org <jnuti@ifpte21.org>; jnuti@ifpte21.org <jnuti@ifpte21.org>; jegy.sering@seiu1021.org <jegy.sering@seiu1021.org>; joshv@smw104.org <joshv@smw104.org>; oumar.fall@seiu1021.org <oumar.fall@seiu1021.org>; oumar.fall@seiu1021.org <oumar.fall@seiu1021.org>; sportillo@ifpte21.org <sportillo@ifpte21.org>; sportillo@ifpte21.org <sportillo@ifpte21.org>; matthew.torres@seiu1021.org <matthew.torres@seiu1021.org>; matthew.torres@seiu1021.org <matthew.torres@seiu1021.org>; cade.crowell@seiu1021.org <cade.crowell@seiu1021.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>; ewallace@ifpte21.org <ewallace@ifpte21.org>; ewallace@ifpte21.org <ewallace@ifpte21.org>; plangrooferslocal40@gmail.com <plangrooferslocal40@gmail.com>; rooferslocal40@gmail.com <rooferslocal40@gmail.com>; Stan Eichenberger <seichenberger@local39.org>; dtuttle@oe3.org <dtuttle@oe3.org>; dtubble@oe3org <dtubble@oe3org>; pkim@ifpte21.org <pkim@ifpte21.org>; Najuwanda Daniels <najuawanda.daniels@seiu1021.org>; Pierre King - UAPD <pking@UAPD.com>; President <president@sanfranciscodsa.com>; max.porter@seiu1021.org <max.porter@seiu1021.org>; kennethlomba@gmail.com <kennethlomba@gmail.com>; snaranjo@cirseiu.org <snaranjo@cirseiu.org>; mdennis@twusf.org <mdennis@twusf.org>; roger marengo <rmarengo@twusf.org>; pwilson@twusf.org <pwilson@twusf.org>; cmoyer@nccrc.org <cmoyer@nccrc.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; sfdpoa@icloud.com <sfdpoa@icloud.com>; mjayne@iam1414.org <mjayne@iam1414.org>; Emanuel, Rachel (DEM) <rachel.emanuel@sfgov.org>; laborers261@gmail.com <laborers261@gmail.com>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; jennifer.esteen@seiu1021.org <jennifer.esteen@seiu1021.org>; emathurin@cirseiu.org <emathurin@cirseiu.org>; abush@cirseiu.org <abush@cirseiu.org>; sbabaria@cirseiu.org <sbabaria@cirseiu.org>; anthony@dc16.us <anthony@dc16.us>; mlobre@sfpoa.org <MLOBRE@sfpoa.org>; @sfpoa.org <@sfpoa.org>; Tracy McCray <tracym@sfpoa.org>; mleach <mleach@ibt856.org>; rooferslocal40@gmail.com <rooferslocal40@gmail.com>; sal@local16.org <sal@local16.org>; Criss@sfmea.com <Criss@sfmea.com>; Meyers, Julie (HSA) <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 <ablood@cirseiu.org>; kcartermartinez@cirseiu.org <kcartermartinez@cirseiu.org>; ecassidy@ifpte21.com <ecassidy@ifpte21.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; sarah.wilson@seiu1021.org <sarah.wilson@seiu1021.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; kpage@ifpte21.org <kpage@ifpte21.org>; tjenkins@uapd.com <tjenkins@uapd.com>; eerbach@ifpte21.org <eerbach@ifpte21.org>; tmathews@ifpte21.org <tmathews@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; jlb@local16.org <jlb@local16.org>; Ricardo.lopez@sfgov.org <Ricardo.lopez@sfgov.org>; Kbasconillo@sflower.org <Kbasconillo@sflower.org>; Sandeep.lal@seiu1021.me <Sandeep.lal@seiu1021.me>; pcamarillo\_seiu@sbcglobal.net <pcamarillo\_seiu@sbcglobal.net>; MRainsford@local39.org <MRainsford@local39.org>; Wendy Frigillana <wendy.frigillana@seiu1021.org>; pscreview@seiu1021.org <pscreview@seiu1021.org>; pkim@ifpte21.org <pkim@ifpte21.org>; agonzalez@iam1414.org <agonzalez@iam1414.org>; ted.zarzecki@seiu1021.net <ted.zarzecki@seiu1021.net>; leah.berlanga@seiu1021.org <leah.berlanga@seiu1021.org>; gail@sfflocal798.org <gail@sfflocal798.org>; cityworker@sfcwu.org <cityworker@sfcwu.org>; davidmkersten@gmail.com <davidmkersten@gmail.com>; djohnson@opcmialocal300.org <djohnson@opcmialocal300.org>; Ramon Hernandez <ramonliuna261@gmail.com>; ablood@cirseiu.org <ablood@cirseiu.org>; pkarinen@nccrc.org <pkarinen@nccrc.org>; tony@dc16.us <tony@dc16.us>; stevek@bac3-ca.org <stevek@bac3-ca.org>; XiuMin Li <xiumin.li@seiu1021.org>; Sin.Yee.Poon@sfgov.org <Sin.Yee.Poon@sfgov.org>; Sean McGarry <smcgarry@nccrc.org>; rmitchell@twusf.org <rmitchell@twusf.org>; grojo@local39.org <grojo@local39.org>; jduritz@uapd.com <jduritz@uapd.com>; staff@sfmea.com <staff@sfmea.com>; mike@dc16.us <mike@dc16.us>; khughes@ibew6.org <khughes@ibew6.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; sfsmsa@gmail.com <sfsmsa@gmail.com>; bart@dc16.us <bart@dc16.us>; David Canham <david.canham@seiu1021.org>; jtanner940@aol.com <jtanner940@aol.com>; Osha Ashworth <oashworth@ibew6.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; laborers261@gmail.com <laborers261@gmail.com>;

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<thomas.vitale@seiu1021.org>;Wu, Cynthia (DPH) <cynthia.wu@sfdph.org>;DHR-PSCCoordinator, DHR (HRD) <dhr-  
pscordinator@sfgov.org>

RECEIPT for Union Notification for PSC 41513 - 23/24 more than \$100k

The PUBLIC HEALTH -- DPH has submitted a request for a Personal Services Contract (PSC) 41513 - 23/24 for \$5,000,000 for Initial Request services for the period 06/01/2024 – 05/31/2029. 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/21988> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC 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: Neuromonitoring Services for patients at San Francisco General Hospital

Funding Source: General Fund, Medicare, Medi-Cal

PSC Duration: 1 year 26 weeks

PSC Amount: \$900,000

**1. Description of Work**

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

The contractor will perform neuromonitoring services for patients undergoing operating room procedures at San Francisco General Hospital. Neuromonitoring services consist of the patient being connected to electrodes during surgery and spontaneous electrophysiologic Signals are obtained and interpreted periodically or continuously throughout the course of the operation.

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

The services are necessary because surgery involving the brain, spinal cord, or peripheral nerves often carries a significant risk of damage to neural structures. If the service is denied, the operating team will be unable to monitor the patients and that can cause new neurological deficits with devastating effects such as loss of sensation or paralysis for the patient.

**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.**  
PSC 4072-12/13

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

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

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

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

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

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

**B. Explain the qualifying circumstances:**

The services are needed only intermittently (approximately twice each week for 8 hours per day). Vendor will provide a computer, neuromonitoring leads and probes and other equipment necessary for the procedure.



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

- A. Specify required skills and/or expertise: A Registered American Board certified Encephalographic Technologist (CNIM) is needed to place the probes and monitor the patient. The certifying organization is the American Board Of Registered Encephalographic Technology.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2220, Physician; 2230, Physician Specialist; 2232, Senior Physician Specialist; 2320, Registered Nurse;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the vendor will provide a computer, neuromonitoring leads and probes and other equipment necessary for the procedure.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
The services are needed only intermittently (approximately twice each week for 8 hours per day).
- 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 to date have been determined to be as needed, intermittent and dependent on the type of surgery scheduled and performed. For such a low volume and procedure-specific needs, it would not be practical to adopt a new Civil Service class to perform this work. In addition,(continued on attachment)

**6. Additional Information**

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

**7. Union Notification: On 05/23/2015, the Department notified the following employee organizations of this PSC/RFP request:**

Physicians and Dentists - 8CC; SEIU, Local 1021 (Staff Nurse & Per Diem Nurse)

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 41467 - 14/15

DHR Analysis/Recommendation:

action date: 10/05/2015

Commission Approval Required  
conditions

Approved by Civil Service Commission with

10/05/2015 DHR Approved for 10/05/2015

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: Professional and General Services

Funding Source: HHWP-Capital Budget

PSC Duration: 1 year 43 weeks

PSC Amount: \$120,000

**1. Description of Work**

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

Holm Powerhouse (HPH) thrust, and guide bearings were manufactured by supplier. Each Hetch Hetchy Water and Power (HHWP) powerhouse keeps a spare set of bearings on location for emergency replacement as the bearings are not a readily available part. In Fall of 2018 HPH spares were used to replace damaged bearings, leaving the powerhouse without a functional set of spares for the past 5 years. Without these emergency spares, the powerhouse is at great risk of an extended shutdown if failure of the operating set was to occur. It is critical that these spares are ready and available for operation with confidence that they will perform without failure. The supplier holds proprietary drawings of these specific bearings that contain critical dimensions not found elsewhere. Use of a different vendor would require measurement of an existing, non-damaged bearing surface to gather these dimensions. The uncertainty of where the measured bearing could lay in the OEM tolerance range coupled with the unknown level of wear to the measured surface itself makes this unacceptable to base rehabilitation on and compromises the precise nature of these hydrodynamic bearings. It is for the reasons listed above that this work must be done by the original manufacturer. In the past, use of different vendors has previously resulted in defective re-pours and fretting from the factory. With the performance of the generators relying heavily on the proper function of these bearings, any defects are unacceptable and original design parameters must be maintained.

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

It is critical that these spares are ready and available for operation with confidence that they will perform without failure. Supplier holds proprietary drawings of these specific bearings that contain critical dimensions not found elsewhere. Use of a different vendor would require measurement of an existing, non-damaged bearing surface to gather these dimensions. The uncertainty of where the measured bearing could lay in the OEM tolerance range coupled with the unknown level of wear to the measured surface itself makes this unacceptable to base rehabilitation on and compromises the precise nature of these hydrodynamic bearings. It is for the reasons listed above that this work must be done by the original manufacturer. In the past, use of different vendors has previously resulted in defective repours and fretting from the factory. With the performance of the generators relying heavily on the proper function of these bearings, any defects are unacceptable and original design parameters must be maintained. In Fall of 2018 HPH spares were used to replace damaged bearings, leaving the powerhouse without a functional set of spares for the past 5 years. Without these emergency spares, the powerhouse is at great risk of an extended shutdown if failure of the operating set was to occur.

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.  
Through PO's

D. Will the contract(s) be renewed?

No

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

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

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

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

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

B. Explain the qualifying circumstances:

HHWP is committed to providing comprehensive support to the supplier, the qualified subcontractor to resurface the Guide Bearing at the HHWP Holm Powerhouse. This capital project necessitates a multifaceted approach, combining various skills, expertise and proprietary knowledge for successful completion. To facilitate this, HHWP will ensure clear and effective communication channels are established, providing the supplier with detailed requirements. Resources from various departments within HHWP will be allocated to assist in logistical coordination, quality control, and to guarantee adherence to safety protocols. HHWP recognizes the unique skills and proprietary knowledge the supplier brings to the project and is dedicated to creating a supportive and collaborative environment. By effectively managing project schedules, mitigating risks, and maintaining regulatory compliance, HHWP aims to achieve a seamless operational transition post-reservicing, enhancing performance and extending the lifespan of the Holm Powerhouse.

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

A. Specify required skills and/or expertise: Supplier must be capable of producing bearings static cast from ASTM B23 Certified Babbitt material. Supplier must possess the equipment/skilled labor to properly apply babbitt, precision machine, and inspect. Inspections include penetrant testing, ultrasonic testing, bluing, and dimensional inspection. Given the critical nature of these bearings, supplier must possess OEM drawings to ensure exact original parameters are maintained and no risks to equipment reliability are created. Due to the risks posed by failure/defect, supplier must have at least 50 years of experience in designing, manufacturing, repairing, and servicing hydrodynamic bearings. .

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: The City does not possess the equipment or skilled labor to pour babbitt bearings or machine bearings to level of precision required.

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

Several requests via telephone and email have been made to manufacturer requesting completion of the compliance requirements. Supplier completed the actions to become a CCSF supplier but was not willing to complete the compliance portion of the requirements. This is an urgent need, therefore waiting for supplier to fulfill the requirements has become timely. Due to OEM requirements, there are no other city resources available.

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

A. Explain why civil service classes are not applicable.

Due to OEM requirements, supplier has proprietary drawings for exact parameters that must be maintained.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this is a specialized service that is only needed when a failure occurs.

**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 city or county employees for this task would not be possible due to the proprietary status, equipment requirements, and experienced skilled labor to resurface the guide bearings. The supplier will be providing a multifaceted approach, combining various skills, expertise, and proprietary knowledge for successful completion. For city or county employees to be trained on this effort they would need to possess the equipment/skilled labor to properly apply babbitt, precision machine, and inspect. Inspections include penetrant testing, ultrasonic testing, bluing, and dimensional inspection. Given the critical nature of these bearings, city or county employees would need to possess OEM drawings to ensure exact original parameters are maintained and no risks to equipment reliability are created. Due to the risks posed by failure/defect, city or county employees would need at least 50 years of experience in designing, manufacturing, repairing, and servicing hydrodynamic bearings. Based on the above information, training city or county employees would not be feasible.

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 02/22/2024, 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@sflower.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 39276 - 23/24

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrr-psccoordinator@sfgov.org](mailto:dhrr-psccoordinator@sfgov.org) on behalf of [shale@sfwater.org](mailto:shale@sfwater.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [kristin.hardy@seiu1021.org](mailto:kristin.hardy@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jegy.sering@seiu1021.org](mailto:jegy.sering@seiu1021.org); [joshv@smw104.org](mailto:joshv@smw104.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [cade.crowell@seiu1021.org](mailto:cade.crowell@seiu1021.org); [jduritz@uapd.com](mailto:jduritz@uapd.com); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); 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[junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [jennifer.esteen@seiu1021.org](mailto:jennifer.esteen@seiu1021.org); [emathurin@cirseiu.org](mailto:emathurin@cirseiu.org); [abush@cirseiu.org](mailto:abush@cirseiu.org); [sbalaria@cirseiu.org](mailto:sbalaria@cirseiu.org); [anthony@dc16.us](mailto:anthony@dc16.us); [mlobre@sfpoa.org](mailto:mlobre@sfpoa.org); [tracym@sfpoa.org](mailto:tracym@sfpoa.org); [mleach@ibt856.org](mailto:mleach@ibt856.org); [rooferslocal40@gmail.com](mailto:rooferslocal40@gmail.com); [sal@local16.org](mailto:sal@local16.org); [Criss@sfmea.com](mailto:Criss@sfmea.com); [Meyers, Julie \(HSA\)](mailto:Meyers,Julie.(HSA)); [seichenberger@local39.org](mailto:seichenberger@local39.org); [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org); [Camaguey@sfmea.com](mailto:Camaguey@sfmea.com); [ablood@cirseiu.org](mailto:ablood@cirseiu.org); [kcartermartinez@cirseiu.org](mailto:kcartermartinez@cirseiu.org); [ecassidy@ifpte21.org](mailto:ecassidy@ifpte21.org); 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**Subject:** Receipt of Notice for new PCS over \$100K PSC # 39276 - 23/24  
**Date:** Thursday, February 22, 2024 11:53:22 AM

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RECEIPT for Union Notification for PSC 39276 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 39276 - 23/24 for \$120,000 for Initial Request services for the period 02/29/2024 – 12/29/2025. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/22076> 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



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: Green-e Energy Verification Audit

Funding Source: CleanPowerSF Operating Budget

PSC Duration: 5 years

PSC Amount: \$140,000

**1. Description of Work**

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

CleanPowerSF's 100% renewable energy products have been Green-e verified since its launch in 2016. Certifying renewable energy products through Green-e provides customers with the assurance that they are reducing the environmental impact of their energy use. Green-e provides consumer protection through clear guidelines, disclosures and standards regarding the sale and marketing of renewable energy. Participating in the program has become an industry standard, and customers committed to quantifying and reporting their emissions through the purchase of a CleanPowerSF renewable energy product may require a verified product. For example, customers who are looking to earn leadership in Energy and Environmental Design (LEED) points for their LEED certification by purchasing renewable energy are required to sign contracts for products that are Green-e certified or equivalent.

To receive Green-e verification, CleanPowerSF's submitted energy products must undergo a third party audit which verifies that energy purchases are matched with generation from eligible renewable facilities. The auditor will review CleanPowerSF product enrollment and sales data and compare them against renewable energy purchases following the Center for Resource Solutions auditing protocol.

Currently, CleanPowerSF offers two 100% renewable energy products: (1) SuperGreen provides 100% renewable energy at a slight premium over the default Green product; and (2) SuperGreen Saver, which provides 100% renewable energy for low-income customers in defined disadvantaged communities in San Francisco. SuperGreen Saver is CleanPowerSF's branded product under the Disadvantaged Communities Green Tariff (DAC-GT) program of the California Public Utilities Commission. In the future, CleanPowerSF may provide other renewable energy products that will be Green-e certified and will also require Green-e audit services.

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

CleanPowerSF renewable energy products have undergone Green-e audits on an annual basis, and CleanPowerSF plans to continue this process in the long-term. If the Green-e certification process is not completed, enrolled customers may not meet requirements for environmental programs in which they are participating by purchasing a Green-e Energy product. Additionally, losing Green-e certification may result in CleanPowerSF's renewable energy products being a less desirable product to customers who are not able to claim all the associated environmental benefits. Failure to complete the required audit by the annual June 1 submission deadline will result in daily late fees of \$100 plus up to \$0.0008/MWh verified until the audit is completed.

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.  
CS-1246 for 2022 SuperGreen Saver sales. PSC 35472-22/23

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.  
The five-year contract term is necessary to ensure that CleanPowerSF can comply with the terms of the Green-e Energy Program using a stable, identified resource.

**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.

B. Explain the qualifying circumstances:

The Green-e audit is completed on an annual basis and takes approximately 25 hours over the course of 1-2 months to complete. As such, an individual with the required certifications is only required on an as-needed basis. Further, California Public Utilities Commission Resolution E-5124 requires that the Disadvantaged Community-Green Tariff program (branded as CleanPowerSF's SuperGreen Saver) obtain Green-e certification. All Green-e certified products must submit to annual verification audits.

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

A. Specify required skills and/or expertise: Individuals completing the audit must be a Certified Public Accountant (CPA) or a Certified Internal Auditor (CIA) in good standing with the Institute of Internal Auditors at the time of the audit if part of the reporting organization. The internal auditor being a CPA is not sufficient in this case. The CIA must not be the same person that prepares and / or enters the verification data and accompanying documents for review. In addition, staff must also complete the Green-e mandatory auditor training session with Green-e Climate staff and provide Green-e with proof of eligibility to complete the Green-e Energy auditing process.

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

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

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

In the past, the CleanPowerSF staff worked with City staff who was a CIA in good standing with the Institute of Internal Auditors to complete this audit. The individual has since left City employment, and CleanPowerSF staff have been notified that there are currently no other staff who possess the needed certification and are able to complete the audit. CleanPowerSF staff queried the SFPUC Business Services Bureau Audit Team and Controller's Office City Services Audit staff as to whether any current staff possess the Certified Internal Auditor credential and were told that none do.

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

A. Explain why civil service classes are not applicable.

To the best of our knowledge, there are no current staff who possess the required Certified Internal Auditor certification.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class to perform this work. The task only takes approximately 25 hours a year to complete. Staff may be encouraged to pursue the Certified Internal Auditor certification. If a Certified Internal Auditor is hired within the SFPU, CleanPowerSF staff will provide guidance on connecting with Center for Resource Solutions training.

**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 is no need to train staff because no staff are known to possess the CIA certification. If there are staff who possess the CIA certification, then training is provided by the Center for Resource Solutions.

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 02/29/2024, 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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42198 - 23/24

DHR Analysis/Recommendation:  
Commission Approval Required  
DHR Approved for 04/01/2024

Civil Service Commission Action:

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

**From:** [dhrr-psccoordinator@sfgov.org](mailto:dhrr-psccoordinator@sfgov.org) on behalf of [shale@sfwater.org](mailto:shale@sfwater.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale, Shawndrea M.); [kristin.hardy@seiu1021.org](mailto:kristin.hardy@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jegy.sering@seiu1021.org](mailto:jegy.sering@seiu1021.org); [joshv@smw104.org](mailto:joshv@smw104.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [cade.crowell@seiu1021.org](mailto:cade.crowell@seiu1021.org); [jduritz@uapd.com](mailto:jduritz@uapd.com); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); 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**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42198 - 23/24  
**Date:** Thursday, February 29, 2024 9:47:43 AM

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RECEIPT for Union Notification for PSC 42198 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42198 - 23/24 for \$140,000 for Initial Request services for the period 10/01/2024 – 09/30/2029. 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/dhrrupal/node/22112> 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

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Green-e Energy Audit

Funding Source: CleanPowerSF Public Purpose Programs

PSC Duration: 5 years 1 day

Fund

PSC Amount: \$100,000

**1. Description of Work**

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

CleanPowerSF will engage an independent certified public accountant to perform a verification audit of the renewable energy product it is supplying to participants in its "SuperGreen Saver" program. The "SuperGreen Saver" program is CleanPowerSF's branded name for the California Public Utilities Commission's Disadvantaged Communities Green Tariff (DAC-GT) Program it began in June 2022. The DAC-GT program provides eligible low-income customers in specific disadvantaged communities to receive a 20% discount on 100% renewable energy. The California PUC requires that the electricity supplied to DAC-GT customers be certified as renewable energy through the Center for Resource Solution's (CRS) Green-e program. Green-e certification requires this third-party verification by June 1 of each year.

To receive Green-e verification, SuperGreen Saver must undergo a third party audit which verifies that SuperGreen Saver purchases are matched with generation from eligible renewable facilities. The auditor will review CleanPowerSF SuperGreen Saver enrollment and sales data and compare it against renewable energy purchases following the Center for Resource Solutions auditing protocol.

CleanPowerSF's SuperGreen product has been Green-e verified since its launch in 2016.

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

Failure to complete the required audit by the annual June 1 submission deadline will result in daily late fees of \$100, plus up to \$0.0008/MWh verified until the audit is completed. CleanPowerSF will be in violation of its agreement with the Center for Resource Solutions if it does not retain a qualified independent certified public accountant to perform a Green-e verification audit. If CleanPowerSF violates the agreement with CRS, it will no longer be able to participate in the CPUC's DAC-GT program. As a result, low income ratepayers in eligible disadvantaged communities will no longer receive a 20% discount on their 100% renewable energy.



C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.  
A similar audit for CleanPowerSF's SuperGreen product has been completed under PRO.0194 for 2021 retail sales and CS-1210 for 2019 retail sales. Prior to that, the service was completed by a Senior Audit and Compliance Analyst at the SFPUC. The staff member who supported the audit had the Certified Internal Auditor (CIA) certification required of internal auditors to complete the audit, but has since left the organization. This certification is not a requirement of the position, and to CleanPowerSF staff's knowledge, there is not a staff person available who meets the requirements to complete the audit.

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.  
This program will run for at least 10 years. An audit is required each year. Five years should give the internal audit team time to bring on a certified internal auditor to perform this work

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

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

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

B. Explain the qualifying circumstances:

The Green-e audit is completed on an annual basis and takes approximately 25 hours over the course of 1-2 months to complete. As such, an individual with the required certifications is only required on an as-needed basis. Currently, the internal auditor certification is not a requirement of the classification that could complete this work.

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

A. Specify required skills and/or expertise: Individuals completing the audit must be a Certified Public Accountant (CPA) or Certified Internal Auditor (CIA) if part of the reporting organization. Possession of a CPA license by an internal auditor member is not sufficient. According to the Staff, individuals must also complete the Green-e mandatory auditor training session with Green-e Climate staff and provide Green-e with proof of eligibility to complete the Green-e Energy auditing process.

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?**

CleanPowerSF staff worked with SFPUC staff who possessed the CIA certification. The individual has left the SFPUC, and CleanPowerSF staff have been notified that there are currently no other staff who possess the needed certification and are able to complete the audit.

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

A. Explain why civil service classes are not applicable.

There are no civil service staff with the required certifications who are available to complete the audit.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class to perform this work. The task only takes approximately 25 hours a year to complete.

**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. Not applicable. Staff need to be licensed to perform this service, not trained. Any staff member who is licensed to perform this service is by that nature trained to provide it.

C. Are there legal mandates requiring the use of contractual services?  
Yes. Pg .15

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

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

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

**7. Union Notification: On 09/26/2022, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 35472 - 22/23

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 10/27/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Helicopter Transportation Services

Funding Source: Hetch Hetchy Water and Power Operating Bud PSC Duration: 5 years

PSC Amount: \$750,000

**1. Description of Work**

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

The SFPUC seeks to select Proposers with proven expertise and extensive experience in the following areas: 1. Provide aerial surveying and patrol services to support the maintenance of the power transmission system; 2. Provide priority transportation services for emergency repairs of infrastructure not accessible during certain periods of the year; 3. Provide transportation to HHWP facilities in the event of unforeseen disasters or emergencies; provide training for Human External Cargo operations, and 4. Provide as-needed shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering power to the grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods.

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, services have been provided in the past through PSC 4045 11/12

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.

Current and past agreements have been for five (5) years. The five (5) year term is intended to provide budgeting and scheduling stability for Hetch Hetchy Water and Power

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

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

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

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

B. Explain the qualifying circumstances:

The proposed helicopter services are required on an as-needed basis for helicopter services including, but not limited to aerial surveying; patrol services; transportation of personnel and/or materials for infrastructure repairs; priority support during unforeseen disasters or emergencies; Human External Cargo training, and, as- needed shuttle services between SFPUC facilities in the Bay Area and/or Hetch Hetchy Water and Power. The City currently does not have resources to provide these services using existing civil service classifications.

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

A. Specify required skills and/or expertise: 1. Provide passenger services on a helicopter of a make and model certified to carry the following cargo/load: a. Three (3) HHWP/SFPUC passengers; plus b. The pilot and all crew required for the passenger services; plus c. Two hundred pounds of cargo. The helicopter must have the ability to land with the load/cargo described above at 6000' elevation above sea level at a temperature of 20 degrees Celsius. 2. Provide cargo services on a helicopter of a make and model certified to lift up to 3000 lbs. at sea level. 3. Provide a copy of the Part 135 Air Carrier Certificate and the Part 133 Air Carrier Certificate. 4. Provide proof that the aircraft to be used on all HHWP flights is on the Part 135 and the Part 133 of the Air Carrier Certificate. 5. Proposer must be able to demonstrate that at least two helicopter pilot's currently on staff, to be used for all HHWP flights, have the following experience (verification required by either Pilot Log Book or Company's Records): a. A minimum of 1,500 hours total helicopter flight time as pilot in command b. A minimum of 500 hours total helicopter flight time flying at low ground levels, i.e., 500 feet AGL (above ground level) c. A minimum of 200 hours total helicopter flight time in mountainous terrain above 5000 feet density altitude (operator may be required to fly up to 10,000 feet in elevation above sea level) d. A minimum of 100 hours total helicopter flight time providing inspection of high voltage transmission lines e. Certified training in 'Human External Load' In the event additional staff is added for HHWP flights during the life of the contract, Proposer must submit applicable staff experience for review and approval by the SFPUC.

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. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

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

Currently, there are no City resources that can provide these services.

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

A. Explain why civil service classes are not applicable.

There are no civil service classifications that provide these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is cost prohibitive.

**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. SFPUC employees will be trained in Human External Cargo and helicopter and equipment safety for a total of 20-30 hours. Approximately 10 SFPUC Electrical Lineman will receive this 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 02/29/2024, 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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42846 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrr-psccoordinator@sfgov.org](mailto:dhrr-psccoordinator@sfgov.org) on behalf of [shale@sfwater.org](mailto:shale@sfwater.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [kristin.hardy@seiu1021.org](mailto:kristin.hardy@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [Chanel.Brown@seiu1021.org](mailto:Chanel.Brown@seiu1021.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [jegy.sering@seiu1021.org](mailto:jegy.sering@seiu1021.org); [joshv@smw104.org](mailto:joshv@smw104.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [cade.crowell@seiu1021.org](mailto:cade.crowell@seiu1021.org); [jduritz@uapd.com](mailto:jduritz@uapd.com); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); 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[junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [jennifer.esteen@seiu1021.org](mailto:jennifer.esteen@seiu1021.org); [emathurin@cirseiu.org](mailto:emathurin@cirseiu.org); [abush@cirseiu.org](mailto:abush@cirseiu.org); [sbalaria@cirseiu.org](mailto:sbalaria@cirseiu.org); [anthony@dc16.us](mailto:anthony@dc16.us); [mlobre@sfpoa.org](mailto:mlobre@sfpoa.org); [tracym@sfpoa.org](mailto:tracym@sfpoa.org); [mleach@ibt856.org](mailto:mleach@ibt856.org); [rooferslocal40@gmail.com](mailto:rooferslocal40@gmail.com); [sal@local16.org](mailto:sal@local16.org); [Criss@sfmea.com](mailto:Criss@sfmea.com); [Julie.Meyers@sfgov.org](mailto:Julie.Meyers@sfgov.org); [seichenberger@local39.org](mailto:seichenberger@local39.org); [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org); [Camaguey@sfmea.com](mailto:Camaguey@sfmea.com); [ablood@cirseiu.org](mailto:ablood@cirseiu.org); [kcartermartinez@cirseiu.org](mailto:kcartermartinez@cirseiu.org); [ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com); 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**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42846 - 23/24  
**Date:** Thursday, February 29, 2024 9:11:50 AM

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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 42846 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42846 - 23/24 for \$750,000 for Initial Request services for the period 05/21/2024 – 05/20/2029. 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/dhrrupal/node/22106> 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

# **Additional Attachment(s)**





# CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE  
MAYOR

September 19, 2013

SCOTT R. HELDFOND  
PRESIDENT

## NOTICE OF CIVIL SERVICE COMMISSION ACTION

E. DENNIS NORMANDY  
VICE PRESIDENT

**SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBERS 4017-13/14; 4018-13/14; 4020-13/14 THROUGH 4022-13/14; 4045-11/12; 4061-07/08; 3035-11/12 AND 4076-09/10.**

DOUGLAS S. CHAN  
COMMISSIONER

KATE FAVETTI  
COMMISSIONER

GINA M. ROCCANOVA  
COMMISSIONER

At its meeting of September 16, 2013 the Civil Service Commission had for its consideration the above matter.

The Commission adopted the report and approved the request for proposed personal services contracts.

**PLEASE NOTE:** *It is important that a copy of this action be kept in the department files as you will need it in the future as proof of Civil Service Commission approval. Please share it with everyone responsible for follow-up.*

JENNIFER C. JOHNSTON  
EXECUTIVE OFFICER

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

CIVIL SERVICE COMMISSION

JENNIFER JOHNSTON  
Executive Officer

### Attachment

Cc: Parveen Boparai, Municipal Transportation Agency  
Micki Callahan, Department of Human Resources  
Jacquie Hale, Department of Public Health  
Shamica Jackson, Public Utilities Commission  
Sung Kim, Department of Public Works  
Sheila Layton, Juvenile Probations  
Joan Lubamersky, General Services Agency  
Ben Rosenfield, Controller's Office  
Jaci Fong, Office of Contract Administration  
Commission File  
Chron

POSTING FOR  
09/16/2013

PROPOSED PERSONAL SERVICES CONTRACTS  
MODIFICATION TO INCREASE CONTRACT AMOUNT/DURATION

PSC No	DeptNo	Dept Description	Approval Type	Modified Amount	Cumulative Total	Description of Work	Start Date - End Date
4045-11/12	40	Public Utilities Commission <i>OS-217/OS-329</i>	Regular	\$500,000	\$596,500	The contractor will provide helicopters and certified pilots to provide as needed services including: Aerial surveying and patrol services to support the maintenance of the power transmission system; transportation services for emergency repairs of infrastructure to areas not accessible all year; transportation to SFPUC and Hetch Hetchy Water and Power facilities in the event of unforeseen disasters or emergencies; and, priority shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.	11/7/2011 - 1/30/2016
4061-07/08	40	Public Utilities Commission <i>OS-924</i>	Regular	\$750,000	\$5,750,000	Water quality related support services including but not limited to software maintenance, technical reviews and studies; analysis of scope change impacts; permit amendments; bench-scale and pilot studies; treatment plant optimization and performance studies; mixing and fluid mechanics evaluations; regulatory compliance and reports; hydraulic modeling and reporting; and future operations planning for the overall system.	12/3/2007 - 1/30/2018
4035-11/12	81	Public Health	Regular	\$33,600	\$100,800	This temporary shuttle bus service will operate six hours a day during peak commute times to decrease the number of single-occupancy vehicles traveling to the San Francisco General Hospital (SFGH) campus. This service is intended to positively impact air quality and reduce traffic and congestion related to the Rebuild of SFGH. The shuttle will operate between SFGH and major transit hubs as directed by the SFGH Rebuild Environmental Impact Report's Environmental Mitigation Measures while the SFGH Rebuild project is underway. The goal of this project is to reduce environmental hazards from excess traffic and improve transportation options.	7/30/2011 - 6/30/2014
4076-09/10	90	Public Works	Regular	\$4,000,000	\$7,798,000	Provide special construction & building materials inspection and testing services for the City's building, construction and renovation projects on an as-needed basis. The testing agencies will utilize certified staff to perform reinforced concrete, high strength bolting, structural steel welding, masonry, shotcrete, and spray-applied fireproofing inspection and testing services. The City intends to award five (5) contracts for \$800,000 and contract duration of five (5) years each.	1/4/2010 - 2/31/2019

Sum of Modified Amounts: **\$5,283,600**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund / Open Space / GO Bond

PSC Amount: \$2,500,000

PSC Est. Start Date: 05/01/2024

PSC Est. End Date 05/01/2029

**1. Description of Work**

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

RPD wishes to select a pool of two to three consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$800,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The Recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed and cost additional resources to complete.

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 49961 - 17/18

D. Will the contract(s) be renewed?

It might be necessary depending on funding and project planning.

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

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

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

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

B. Explain the qualifying circumstances:

The scope of services would be accomplished through as-needed contracts. Funds for the work would be encumbered only as projects requiring Historic or Archaeological review arise.

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

A. Specify required skills and/or expertise: Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives.

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review;

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.

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

**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 - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of 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 02/02/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21

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

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

Address: McLaren Lodge, 501 Stanyan Street San Francisco, CA 94117

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49592 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [sean.mcfadden@sfgov.org](mailto:sean.mcfadden@sfgov.org)  
**To:** [McFadden, Sean \(REC\); jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; 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; McFadden, Sean \(REC\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:McFadden, Sean (REC); jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; 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; McFadden, Sean (REC); DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 49592 - 23/24  
**Date:** Friday, February 2, 2024 3:35:32 PM

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RECEIPT for Union Notification for PSC 49592 - 23/24 more than \$100k

The RECREATION AND PARK COMMISSION -- REC has submitted a request for a Personal Services Contract (PSC) 49592 - 23/24 for \$2,500,000 for Initial Request services for the period 05/01/2024 – 05/01/2029. 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/22014> 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: RECREATION AND PARK COMMISSION

Dept. Code: REC

Type of Request:  Initial  Modification of an existing PSC (PSC # 49961 - 17/18)

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund/Open Space Fund/2012 GO Bond

PSC Original Approved Amount: \$1,800,000 PSC Original Approved Duration: 05/01/18 - 04/25/23 (4 years 51 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 04/17/23-06/30/23 (9 weeks 3 days)

PSC Cumulative Amount Proposed: \$1,800,000 PSC Cumulative Duration Proposed: 5 years 8 weeks

**1. Description of Work**

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

RPD wishes to select a pool of three to four consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$600,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed.

**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 49961 - 17/18

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

The contract may be renewed depending on City resources and need.

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

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

A. Display all that apply

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

Explain the qualifying circumstances:

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed the Recreation and Park Department to engage external consultants for this type of work.

B. Reason for the request for modification:

Extend PSC for as-needed contracts until new program and PSC is developed in Spring.

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

A. Specify required skills and/or expertise: For Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. For Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives;

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;

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

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No training - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of 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.  
As-needed contractors contract will be extended.

7. **Union Notification:** On 07/27/23, 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: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street, San Francisco, CA 94117

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49961 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 08/02/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund/Open Space Fund/2012 GO Bond

PSC Amount: \$1,800,000

PSC Est. Start Date: 05/01/2018

PSC Est. End Date 04/25/2023

**1. Description of Work**

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

RPD wishes to select a pool of three to four consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$600,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed.

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.

For projects where the CEQA review process requires more labor than is available through the Planning Department. The Planning Department has requested that we engage an external Historic/Archaeological consultants. At the request of the Civil Service Commission, the Recreation and Park Department re-visited the process for utilizing outside services for this particular type of service. The Planning Department confirmed in writing that they are supportive of the Recreation and Park Department's efforts to create this consultant pool to perform the specified work. The Planning Department clarified that although they will work with the Recreation and Park Department to review each project scope of work and actual consultant work product submittals, they do not need to be asked for permission to use consultants on individual projects.

D. Will the contract(s) be renewed?

The contract may be renewed depending on City resources and need.

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

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

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

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

B. Explain the qualifying circumstances:

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed the Recreation and Park Department to engage external consultants for this type of work.

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

A. Specify required skills and/or expertise: For Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. For Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives;

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;

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

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

For projects where the CEQA review process requires more labor than is available through the Planning Department, the Planning Department has requested that we engage an external Historic/Archaeological consultant.

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

A. Explain why civil service classes are not applicable.

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

**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 - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of 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 04/17/2018, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21

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

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

Address: 501 Stanyan Street San Francisco, CA 94117

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 49961 - 17/18

DHR Analysis/Recommendation:

action date: 08/06/2018

Commission Approval Required

continued - 06/18/2018

08/06/2018 DHR Approved for 08/06/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Financial Counseling - MEDA

Funding Source: Grant and General Funds

PSC Duration: 5 years

PSC Amount: \$4,000,000

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs. After successfully launching pilot programs with various City departments, there has been a continued interest in expanded services. Consequences of denial would include limiting the City's ability to support low-income residents with options to improve their financial literacy and improve financial outcomes.

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

Services were provided via pilot programs under PSC 44886-19/20 & PSC 36741-19/20.

D. Will the contract(s) be renewed?

If necessary.

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 Treasurer and Tax Collector (TTX) requires a sustained partnership for certified financial counseling services to support increased interest from other City departments to create financial coaching pilot programs for their respective constituents.

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

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

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

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

B. Explain the qualifying circumstances:

No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work as they are provided on an as needed basis. Services are grant funded and funded by work orders with other departments so there is no certainty on the amount of funding annually.

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: NO.

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

N/A

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the service is very technical and funding is uncertain.

**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. N/A - Contractor will not be training City staff as financial counselors must be certified.
- 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 02/01/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 42965 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrrpscordinator@sfgov.org](mailto:dhrrpscordinator@sfgov.org) on behalf of [amanda.wentworth@sfgov.org](mailto:amanda.wentworth@sfgov.org)  
**To:** [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [DHR-PSCCoordinator, DHR \(HRD\)](#)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 42965 - 23/24  
**Date:** Thursday, February 1, 2024 11:46:15 AM

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RECEIPT for Union Notification for PSC 42965 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 42965 - 23/24 for \$4,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/22005> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

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

# **Additional Attachment(s)**

**City and County of San Francisco  
Sourcing Event ID: 0000008693**

**Formal Request for Proposals for:  
OFE Financial Counseling Service Provider  
Amended November 6, 2023 – changes in RED**

This Solicitation can be viewed on the City’s Supplier Portal at: <https://sfcitypartner.sfgov.org/pages/index.aspx> and at the Office of the Treasurer and Tax Collectors website: <https://sftreasurer.org/about-us/request-proposals>



<b>Proposal Phase</b>	<b>Tentative Date</b>
Request for Proposals Issued	Tuesday, September 26, 2023, 5:00PM
Written Questions Due Date	Friday, October 13, 2023, 5:00PM
Answers and Clarifications Published	Friday, October 20, 2023, 5:00PM
Proposal Due Date	<del>Monday, October 30, 2023, 5:00PM</del> <b>Friday, November 17, 2023, 5:00PM</b>
Short-Listing Notification for Oral Interviews	<del>Week of December 4, 2023</del> <b>Week of December 18, 2023</b>
Oral Interviews	<del>Week of December 11, 2023</del> <b>Week of January 1, 2024 and Week of January 8, 2024</b>
Notice of Intent to Award	<del>Week of December 18, 2023</del> <b>Week of January 15, 2024</b>
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City’s issuance of a Notice of Intent to Award.
Contract Administrator:	Andrea Yee Financial Capability Program Manager San Francisco Office of Financial Empowerment 1 Dr Carlton B Goodlett Pl, San Francisco, CA 94102 Phone: (415) 554-7444 Email: <a href="mailto:andrea.yee@sfgov.org">andrea.yee@sfgov.org</a>

**Attachments**

- Attachment 1: City’s Contract Terms
- Attachment 2: Scope of Work
- Attachment 3: Proposer Information and Reference
- Attachment 4: Minimum Qualifications
- Attachment 5: Core Competencies Form
- Attachment 6: Price Proposal – updated 11.6.2023**

**Appendices**

- Appendix A: Financial Counseling to Invoice Template – updated 11.6.2023**

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## **I. INTRODUCTION AND SOLICITATION SCHEDULE**

### **A. Introduction**

#### **1. General**

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by the Office of the Treasurer and Tax Collector (hereinafter, “TTX” or “City”). TTX is seeking qualified organizations (“Proposers”) to provide proposals (“Proposal”) for financial counseling service provision to people living, working, or receiving services in San Francisco, with an emphasis on BIPOC, low-income, and at-risk communities with inequitable financial access and opportunities.

The City has approximately 65 departments, ranging from small to very large. Some departments maintain facilities located outside of the geographic limits of the City. TTX shall order goods and/or services covered by the awarded contract(s) through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract(s) during the contract term.

#### **Selection Overview**

The City shall award contracts to up to four (4) Proposers that meet the Minimum Qualifications of this Solicitation, score a minimum of 70 points on the written proposal and 50 points in the oral interview. Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments and community-based partners. Proposals will be evaluated based on the criteria outlined herein.

### **B. Anticipated Contract Term**

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of 5 (five) years. The City at its sole, absolute discretion, shall have the option to extend the term for up to 5 (five) additional years for a total of up to 10 (ten) years.

#### **Anticipated Contract Not to Exceed Amount**

Each contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of \$4 million for the initial term. This amount is based on City’s estimated spend over the advertised initial contract term. Should City’s actual spend exceed its estimated spend for the initial term, City may in its sole discretion increase the contract NTE for the initial term. Should City exercise its options to extend the contract beyond the initial term, City may also elect to increase the NTE proportionally.

### **C. Indefinite Quantity, As-Needed Contract**

A contract awarded pursuant to this Solicitation will result in a term, indefinite quantities, as-needed contract. TTX shall request a minimum of \$200,000 of services as outlined in this solicitation in the first year of the contract. For subsequent years of the contract, TTX shall allocate additional professional services work as needed to meet the needs of financial counseling clients, our department, and our program funders. Unless otherwise specified herein, deliveries and services will be required in quantities and at times as ordered during the period of the contract. Estimated quantities, if any, stated in this Solicitation are approximations only. City, in its sole discretion, may purchase any greater or lesser quantity. City may also make purchases of items awarded pursuant to this Solicitation from other suppliers when City determines, in its sole discretion, that it is in the best interest of the City to do so.

**D. Cooperative Agreement**

Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation upon approval.

**E. Solicitation Schedule**

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other published pertinent information.

<b>Proposal Phase</b>	<b>Tentative Date</b>
Request for Proposals Issued	Tuesday, September 26, 2023, 5:00PM
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Notice of Intent to Award	<del>Week of December 18, 2023</del> <b>Week of January 15, 2024</b>
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.

**F. Contract Terms and Negotiations**

The successful Proposer(s) will be required to enter into a contract substantially in the form attached hereto as Attachment 1, City’s Contract Terms. **If Proposer is unable to accept City’s Contract Terms substantially in the form presented a revised, or redlined, copy of Attachment 1, City’s Contract Terms will be requested within ten days of the notice of Intent to Award to the selected Proposer(s).** The revised copy of City’s Contract Terms must clearly:

- (1) Mark those sections to which it objects;
- (2) Set forth Proposer’s alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the next highest-ranking score.

**II. PROPOSAL EVALUATION CRITERIA**

<b>Evaluation Phase</b>	<b>Maximum Points</b>
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	15 Points
Written Proposal	85 Points



Oral Interviews	75 Points
<b>TOTAL</b>	<b>175 Points</b>

Proposals should consist of the following:

Required Document	Description
<b>Written Proposal</b>	<input type="checkbox"/> Approach to Scope of Work (Up to 7 pages) <input type="checkbox"/> Qualifications and Organizational Capacity (Up to 4 pages) <input type="checkbox"/> Resumes for each staff listed in this section
<b>Attachment 3</b>	Proposer Information and References
<b>Attachment 4</b>	Minimum Qualifications
<b>Attachment 5</b>	Core Competencies Form
<b>Attachment 6</b>	Price Proposal

### III. MINIMUM QUALIFICATIONS DOCUMENTATION REQUIRED WITH PROPOSAL (PASS/FAIL)

The Proposer must demonstrate that they meet all of the Minimum Qualifications listed below by completing Attachment 4. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
<b>MQ1</b>	A minimum of three (3) years of delivering one-on-one financial education, financial counseling, or similar or related service, particularly to those from BIPOC, low-income and at-risk communities inequitable economic opportunity and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
<b>MQ2</b>	Agreement to use data tracking and reporting system as required by the City to track, manage and report on critical data points for each client.
<b>MQ3</b>	Ability to provide financial counseling both virtually and in-person, with Bay Area-based staff available as needed for in-person outreach and financial counseling. No physical office is required and Bay Area-based staff may be Proposer's staff or subcontracted.
<b>MQ4</b>	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within thirty (30) days of notice of award.

### IV. WRITTEN PROPOSAL (85 POINTS)

In addition to completing Attachment 4 - Minimum Qualifications as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below.

A. Approach to Scope of Work – up to 7 pages. (45 Points)

- a. Service Delivery:
  - Describe your organization’s approach to delivering financial counseling services and meeting all requirements outlined in the Scope of Services (Attachment 2).
  - How does this program approach meet clients where they are and appropriately address the needs of the target populations in this RFP?
  - What specific strategies does your organization employ to achieve client outcomes and engage clients in follow-up activities?
- b. Integrations and Referrals: Financial counseling clients experience positive outcomes when counseling services are integrated with the delivery of other services. How will your organization add value for clients through the deployment of program integrations and collaboration with referral partners?
- c. Quality Control: Describe your organization’s techniques for quality assurance and maintaining consistently high standards of service delivery. Give examples, if applicable, of previous experience identifying and implementing improvements using these quality control measures.
- d. Client transition: Your organization may be required to transition clients to or from another service provider. Describe how you would facilitate and manage this process to minimize service disruption and client loss.
- e. Client input: Describe your organization’s methods, if any, for collecting and incorporating client input regarding program design and service delivery.

B. Qualifications and Organizational Capacity – up to 4 pages (not including resumes/job descriptions) (40 Points)

- a. Describe your organization’s qualifications and expertise that will enable you to successfully deliver services as described in the Scope of Services (Attachment 2). What is your organization’s experience working with the target populations listed?
- b. Staffing Plan:
  - Describe the staffing plan that will be employed to provide service, supervision, and program management.
  - Attach an organizational chart and resumes of key personnel who will be providing financial counseling, as well as those who will have oversight and management of this service.
  - Clearly identify whether services will be performed by existing staff or by proposed staff.
- c. Hiring: Describe the organizational approach to staff recruitment and hiring.
- d. Training: Describe organization’s staff training plans, both initial training and continuing education units (CEUs). How does your organization keep financial counselors up-to-date on burgeoning areas of concern in financial security and innovative solutions for clients?
- e. Retention: Counseling experience is tied to client relationship building and outcomes achievement. Describe your organization’s approach to staff retention.
- f. *Optional* - Subcontracting:

- Does your organization plan to perform any of the services and requirements outlined in the Scope of Services (Attachment 2) with subcontractors?
- If so, describe how the collaboration will work and the roles and responsibilities of the lead organization and subcontractors.
- List the subcontractor(s) and provide letters of commitment to engage in this work if the contract is awarded.
- Provide resumes for key personnel of subcontractor(s) who will be working directly on this program.

**V. PRICE PROPOSAL (15 Points)**

**A. Price Proposal Format and Allocation of Points**

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Price Proposal consisting of each item set forth in Attachment 6 – Price Proposal.

~~The Price proposal will be evaluated by scoring the proposed Base Hourly Rate. The Base Hourly Rate will be scored based on the following formula:~~

~~Score = (Lowest Proposed Base Hourly Rate/Proposer’s Base Hourly Rate) x (15 points)~~

The Price proposal will be evaluated by scoring the proposed Base Hourly Rate, the Overhead % Rate, Overhead Detail, and the allocation of a score for usage of the Equity Pricing Structure as follows:

<b>Criteria</b>	<b>Points</b>
Base Hourly Rate	5 points
Overhead % Rate	5 points
Overhead Detail	2 points
Equity Pricing Structure	3 points
<b>TOTAL</b>	<b>15 points</b>

The Base Hourly Rate will be scored based on the following formula:

Score = (Lowest Proposed Base Hourly Rate/Proposer’s Base Hourly Rate) x (5 points)

The Overhead % Rate will be scored based on the following formula:

Score = (Lowest Proposed Overhead %/Proposer’s Overhead %) x (5 points)

Contractor shall receive 2 points for providing a detailed breakdown of Overhead costs and up to 3 points for use of the Equity Pricing Structure.

## B. Price Proposal Evaluation Period

The City will attempt to evaluate Price Proposals within one-hundred eighty (180) days after receipt of Proposals. If City requires additional evaluation time, all Proposers will be notified in writing of the new expected award date.

## VI. ORAL INTERVIEWS (75 POINTS)

The Evaluation Panel will hold oral interviews with Proposers that have met the Minimum Qualifications and whose Written Proposals received a score of at least 70 Points. Prior to Oral interviews, the City will send a letter to each invited Proposer regarding the format and general rules of the interview. The City reserves the right to limit participation in the panel interviews to Proposers' key/lead team members and to exclude, for example, sub-consultants on multiple teams. The interview evaluation process may include (and be scored based on) a presentation by the Proposer and/or interview questions from the Evaluation Panel. Those questions may include and be related to Proposers' and key/lead team members' qualifications, their work approach, project task descriptions, team organization, and any questions which seek to clarify Proposal components. Proposers may also be scored on follow-up questions if clarification of Proposer's responses is necessary. The same set of interview questions will be used for all Proposers and shall be presented to Proposers at least one week prior to the date of interview to allow Proposers sufficient time to prepare their responses. The Evaluation Panel may ask follow-up questions if clarification of Proposer's responses is necessary. The Evaluation Panel will proceed to evaluate each Proposer based on each Proposer's presentation and responses.

## VII. SUPPORTING DOCUMENTATION REQUIRED PRIOR TO CONTRACT EXECUTION

Proposers must provide each Required Supporting Documentation ("RSD") identified below prior to Award. Failure to do so may result in the Proposal being deemed Non-Responsive.

<b>RSD #1</b>	Evidence that Proposer is 12B compliant or likely to become compliant within 30 calendar days of the Proposal Due Date.
<b>RSD #2</b>	<p><b>Non-Profit Entities:</b> If Proposer is a non-profit organization and receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds:</p> <p>(1) a statement describing Proposer's efforts to comply with the Chapter 12L provisions regarding public access to Proposer's meetings and records, and</p> <p>(2) a summary and disposition of all complaints concerning the Proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p> <p><i>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent agreement reached on the basis of the Proposal.</i></p>

## VIII. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements can be found in Attachment 1, City's Contract Terms, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set

forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

**A. Proposers Unable to do Business with the City**

**1. Generally**

Proposers that do not comply with laws set forth in San Francisco’s Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City’s Contract Terms.

**2. Administrative Code Chapter 12B**

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**B. Health Care Accountability Ordinance**

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each covered employee who is not subject to Prevailing Wage, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards are available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

**C. Minimum Compensation Ordinance**

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees who are not subject to Prevailing Wage no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco> *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

**D. First Source Hiring Program**

A Proposer selected pursuant to this Solicitation shall comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative

Code. Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.

#### **E. Other Social Policy Provisions**

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

### **IX. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS**

#### **A. Proposal Questions and Submissions**

##### **1. Proposer Questions and Requests for Clarification**

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx> and the TTX website: <https://sftreasurer.org/about-us/request-proposals>.

##### **2. Proposal Format**

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5" on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

##### **3. Time and Place for Submission of Proposals**

Prior to the Proposal submission deadline, Proposers must email a copy of their proposal to the Contract Administrator listed on this RFP. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

#### **B. Proposal Addenda**

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal and the TTX website. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

**THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED CONTRACT TERMS.**

**C. Public Disclosure**

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

**D. Limitation on Communications During Solicitation**

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

**E. Proposal Selection Shall not Imply Acceptance**

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

**F. Solicitation Errors and Omissions**

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

## **G. Objections to Solicitation Terms**

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

## **H. Protest Procedures**

### **1. Protest of Non-Responsiveness Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **2. Protest of Non-Responsible Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **3. Protest of Contract Award**

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **4. Delivery of Protests**

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

## **I. Proposal Term**

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.



## **J. Revision to Proposal**

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

## **K. Proposal Errors and Omissions**

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

## **L. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

## **M. Proposer's Obligations under the Campaign Reform Ordinance**

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at [\(415\)](#)

[252-3100](https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders) or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

**N. Reservations of Rights by the City**

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

**O. No Waiver**

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

**P. Other**

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:
  - a. Any condition set forth in this Solicitation;
  - b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
  - c. Delivery time(s).
2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.
3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.
4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.
5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

## PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTORDept. Code: TTXType of Request:  Initial  Modification of an existing PSC (PSC # 36741 - 19/20)Type of Approval:  Expedited  Regular  Annual  Continuing  (Omit Posting)Type of Service: Smart Money Coaching-Transitional Age YouthFunding Source: General fundsPSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/20 - 06/30/21 (1 year 12 weeks)PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: no duration addedPSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 03/19/21-06/30/23 (2 years)PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 12/20/22-06/30/25 (2 years 1 day)PSC Cumulative Amount Proposed: \$1,200,000 PSC Cumulative Duration Proposed: 5 years 13 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

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

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

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

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

Yes, PSC 36741-19/20

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

Yes

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

Add money.

**2. Reason(s) for the Request****A. Display all that apply**

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

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

Explain the qualifying circumstances:

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

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

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with at-risk transitional age youth (TAY) and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

**6. Additional Information**

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

- 7. Union Notification:** On 12/20/22, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21;

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 36741 - 19/20

DHR Analysis/Recommendation:

02/06/2023

Commission Approval Required

Approved by Civil Service Commission

02/06/2023 DHR Approved for 02/06/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request:  Initial  Modification of an existing PSC (PSC # 44886 - 19/20)

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

Type of Service: TTX-Smart Money Coach-Low Income

Funding Source: General Funds

PSC Original Approved Amount: \$270,000 PSC Original Approved Duration: 07/01/20 - 06/30/22 (1 year 52 weeks)

PSC Mod#1 Amount: \$1,400,000 PSC Mod#1 Duration: 03/19/21-06/30/24 (2 years 1 day)

PSC Cumulative Amount Proposed: \$1,670,000 PSC Cumulative Duration Proposed: 4 years

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs.

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

Yes, PSC 44886-19/20

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

Potentially.

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

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

**A. Display all that apply**

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

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

**Explain the qualifying circumstances:**

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

**B. Reason for the request for modification:**

Adding time and money.

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

**A. Specify required skills and/or expertise:** The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing

solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.

- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: NO

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
There will be no training as services must be performed by certified financial coaches with specialized knowledge and experience.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
Yes, we are using the same contractor for PSC 44886-19/20

**7. Union Notification: On 03/19/21, the Department notified the following employee organizations of this PSC/RFP request:**

Prof & Tech Eng, Local 21;

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

Name: Kimmmie Wu Phone: 415-554-4513 Email: Kimmmie.wu@sfgov.org

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44886 - 19/20

DHR Analysis/Recommendation:

10/02/2023

Commission Approval Required

Approved by Civil Service Commission

10/02/2023 DHR Approved for 10/02/2023



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Financial Counseling - FCI

Funding Source: Grant and General Funds

PSC Duration: 5 years

PSC Amount: \$4,000,000

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs. After successfully launching pilot programs with various City departments, there has been a continued interest in expanded services. Consequences of denial would include limiting the City's ability to support low-income residents with options to improve their financial literacy and improve financial outcomes.

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

Services were provided via pilot programs under PSC 44886-19/20 & PSC 36741-19/20.

D. Will the contract(s) be renewed?

If necessary.

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 Treasurer and Tax Collector (TTX) requires a sustained partnership for certified financial counseling services to support increased interest from other City departments to create financial coaching pilot programs for their respective constituents.

**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).

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

B. Explain the qualifying circumstances:

No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work as they are provided on an as needed basis. Services are grant funded and funded by work orders with other departments so there is no certainty on the amount of funding annually.

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
No.

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

N/A

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the service is very technical and funding is uncertain.

**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. N/A - Contractor will not be training City staff as financial counselors must be certified.
- 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 02/01/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 43614 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrr-psccordinator@sfgov.org](mailto:dhrr-psccordinator@sfgov.org) on behalf of [amanda.wentworth@sfgov.org](mailto:amanda.wentworth@sfgov.org)  
**To:** [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [DHR-PSCCoordinator, DHR \(HRD\)](#)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 43614 - 23/24  
**Date:** Thursday, February 1, 2024 11:27:17 AM

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RECEIPT for Union Notification for PSC 43614 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 43614 - 23/24 for \$4,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/22000> 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)**

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Financial Counseling - BALANCE

Funding Source: Grant and General Funds

PSC Duration: 5 years

PSC Amount: \$4,000,000

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs. After successfully launching pilot programs with various City departments, there has been a continued interest in expanded services. Consequences of denial would include limiting the City's ability to support low-income residents with options to improve their financial literacy and improve financial outcomes.

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

Services were provided via pilot programs under PSC 44886-19/20 & PSC 36741-19/20.

D. Will the contract(s) be renewed?

If necessary.

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 Treasurer and Tax Collector (TTX) requires a sustained partnership for certified financial counseling services to support increased interest from other City departments to create financial coaching pilot programs for their respective constituents.

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

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

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

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



B. Explain the qualifying circumstances:

No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work as they are provided on an as needed basis. Services are grant funded and funded by work orders with other departments so there is no certainty on the amount of funding annually.

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
No.

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

N/A

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the service is very technical and funding is uncertain.

**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. N/A - Contractor will not be training City staff as financial counselors must be certified.
- 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 02/01/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140 San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44429 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrrpscordinator@sfgov.org](mailto:dhrrpscordinator@sfgov.org) on behalf of [amanda.wentworth@sfgov.org](mailto:amanda.wentworth@sfgov.org)  
**To:** [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [DHR-PSCCoordinator, DHR \(HRD\)](#)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 44429 - 23/24  
**Date:** Thursday, February 1, 2024 11:37:12 AM

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RECEIPT for Union Notification for PSC 44429 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 44429 - 23/24 for \$4,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/dhrrupal/node/22004> 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)**

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Financial Counseling - SF LGBT

Funding Source: Grant and General Funds

PSC Duration: 5 years

PSC Amount: \$4,000,000

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs. After successfully launching pilot programs with various City departments, there has been a continued interest in expanded services. Consequences of denial would include limiting the City's ability to support low-income residents with options to improve their financial literacy and improve financial outcomes.

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

Services were provided via pilot programs under PSC 44886-19/20 & PSC 36741-19/20.

D. Will the contract(s) be renewed?

If necessary.

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 Treasurer and Tax Collector (TTX) requires a sustained partnership for certified financial counseling services to support increased interest from other City departments to create financial coaching pilot programs for their respective constituents.

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

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

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

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

B. Explain the qualifying circumstances:

No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work as they are provided on an as needed basis. Services are grant funded and funded by work orders with other departments so there is no certainty on the amount of funding annually.

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
No.

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

N/A

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the service is very technical and funding is uncertain.

**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. N/A - Contractor will not be training City staff as financial counselors must be certified.
- 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 02/01/2024, the Department notified the following employee organizations of this PSC/RFP request:  
Prof & Tech Eng, Local 21

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46970 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhrrpscordinator@sfgov.org](mailto:dhrrpscordinator@sfgov.org) on behalf of [amanda.wentworth@sfgov.org](mailto:amanda.wentworth@sfgov.org)  
**To:** [Wentworth, Amanda \(TTX\)](mailto:Wentworth,Amanda(TTX)@ifpte21.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [l21pscreview@ifpte21.org](mailto:l21pscreview@ifpte21.org); [Wentworth, Amanda \(TTX\)](mailto:Wentworth,Amanda(TTX)@ifpte21.org); [DHR-PSCCoordinator, DHR \(HRD\)](#)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 46970 - 23/24  
**Date:** Thursday, February 1, 2024 11:55:16 AM

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RECEIPT for Union Notification for PSC 46970 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 46970 - 23/24 for \$4,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. 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/22006> 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)**

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

# **Modification**

## **Personal Services Contracts**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request:  Initial  Modification of an existing PSC (PSC # 40238 - 19/20)

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Original Approved Amount: \$3,600,000 PSC Original Approved Duration: 06/01/20 - 05/31/23 (2 years 52 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 05/31/23-06/30/24 (1 year 4 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/24-07/31/25 (1 year 4 weeks)

PSC Cumulative Amount Proposed: \$3,600,000 PSC Cumulative Duration Proposed: 5 years 8 weeks

**1. Description of Work**

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

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 40238-19/20 MOD1

D. Will the contract(s) be renewed?

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

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:

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

B. Reason for the request for modification:

Exercise the final option to extend contract terms for 1 year to expire on 7/31/2025. No increase to the approved PSC contract amount.

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

- A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
There are currently no civil service classes that meet the specific expertise required for this service.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.
- 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 02/29/24, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified**

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

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



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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/01/2024

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

## Gong, Henry (SHF)

---

**From:** dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org  
**Sent:** Thursday, February 29, 2024 10:58 AM  
**To:** Gong, Henry (SHF); kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegy.sering@seiu1021.org; joshv@smw104.org; oumar.fall@seiu1021.org; oumar.fall@seiu1021.org; sportillo@ifpte21.org; sportillo@ifpte21.org; matthew.torres@seiu1021.org; matthew.torres@seiu1021.org; cade.crowell@seiu1021.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 (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; Najuwanda Daniels; Pierre King - UAPD; President; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marengo; 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; Meyers, Julie (HSA); 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; Kristen Schumacher; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sfwater.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@opcmialocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; Sean McGarry; 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; DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Modification Request to PSC # 40238 - 19/20 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The SHERIFF -- SHF has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1, 2024 – July 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/19911>

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: SHERIFF

Dept. Code: SHF

Type of Request:  Initial  Modification of an existing PSC (PSC # 40238 - 19/20)

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Original Approved Amount: \$3,600,000 PSC Original Approved Duration: 06/01/20 - 05/31/23 (2 years 52 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 05/31/23-06/30/24 (1 year 4 weeks)

PSC Cumulative Amount Proposed: \$3,600,000 PSC Cumulative Duration Proposed: 4 years 4 weeks

**1. Description of Work**

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

**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, under PSC 40238-19/20

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

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

**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:**

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

**B. Reason for the request for modification:**

Exercise the first of two options to extend contract terms for 1 additional year to expire on 6/30/2024.

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

- A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.
- B. Which, if any, civil service class(es) normally perform(s) this work? none
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
There are currently no civil service classes that meet the specific expertise required for this service.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.
- 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 02/15/23, 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: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/28/2023



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF -- SHE

Dept. Code: SHE

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

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Duration: 2 years 52 weeks

PSC Amount: \$3,600,000

**1. Description of Work**

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

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 incarcerated person communication solution was provided to the Sheriff's Department (SFSD) under a revenue contract at no cost to the City. The contract generated commission revenue to contribute to the Inmate Welfare Fund (IWF). The IWF is utilized for the benefit, education, and welfare of the incarcerated person. The Civil Service Commission approved PSC 38332-14/15.

D. Will the contract(s) be renewed?

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

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

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

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

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

B. Explain the qualifying circumstances:

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

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

A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.

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

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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

Given the specific expertise required, the Sheriff's Department is unable to obtain this service within the City.

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

A. Explain why civil service classes are not applicable.

There are currently no civil service classes that meet the specific expertise required for this service.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

**6. Additional Information**

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.

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 11/19/2019, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

action date: 01/06/2020

Commission Approval Required

Approved by Civil Service Commission

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000 PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000 PSC Mod#3 Duration: no duration added

PSC Mod#4 Amount: \$11,000,000 PSC Mod#4 Duration: 11/01/21-10/31/24 (2 years 43 weeks)

PSC Mod#5 Amount: \$2,500,000 PSC Mod#5 Duration: 01/29/24-04/30/25 (25 weeks 6 days)

PSC Cumulative Amount Proposed: \$35,600,000 PSC Cumulative Duration Proposed: 12 years 43 weeks

**1. Description of Work**

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

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

Services have been provided in the past through earlier PSC request. See 4141-11/12

D. Will the contract(s) be renewed?

CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

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:

Contract CS-247(R), a three-year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 4 modifies the end date to 10/31/2024, which accommodates the second three-year renewal option.

**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 contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Reason for the request for modification:

CleanPowerSF requests to increase the contract's capacity by \$2.5M and extend the contract's duration by six months. This is to ensure there is no break in service and allow sufficient time for transition is a new back office contractor wins the bid for PRO. 0297.

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

- A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol; (2) experience managing call center functions that rely on timely EDI information from PG&E to respond to potential customer queries;(3) experience with wholesale and retail electricity markets; and (4) experience/expertise in providing Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1478, Senior Water Services Clerk; 1480, Principal Water Services Clerk; 4310, Commercial Div Asst Sprv; 5601, Utility Analyst; 5602, Utility Specialist; 0922, Manager l;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide the necessary IT systems and software to support Customer Information Systems, perform billing calculations, and execute EDI transfer.

**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.  
Existing resources with the necessary skills are not available, and the project timeframe and scope precludes recruitment, hiring and training new staff quickly enough. In particular, the need for significant additional call center resources during CleanPowerSF's enrollment period will greatly exceed the resources needed once the program is fully enrolled (call volumes spike during enrollment periods); to accommodate the high call volumes associated with the enrollment process, the contractor provides flexibility in staffing levels that is not possible with Civil Service Employees. Once call volume stabilizes, the PUC plans to incorporate CleanPowerSF call center operations currently provided under this contract into its Customer Service Bureau, and the contractor will provide an essential role in ensuring the success of this transition.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: As indicated above, certain functions performed under this contract can be performed by existing civil service classifications. After CleanPowerSF has completed citywide enrollment and enrollment-related call volumes have stabilized, the PUC plans to provide call center services with existing civil service classes. The PUC plans to hire additional staff to commence this process during the next two-year budget cycle. The PUC is analyzing the feasibility of bringing the billing and data management tasks provided by the contractor in-house. However, initial analysis indicates that the PUC will need to make significant investments in IT systems that are specific to CCA business processes, which the PUC currently does not own or operate. For this reason, it has been the PUC's determination that in the near-term it would not be practical to conduct these activities internally, and that using a contractor is the most efficient use of City resources. The PUC will continue to assess the feasibility of bringing contracted services in-house as the program matures.

**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 contract provides an option for PUC to take call center operations in-house. This entails the contractor providing a Transition-Out Plan, including detailed training materials and both face-to-face and interactive web-based

training on CCA program information as well as full system training. The contract does not specify a specific number of training hours but provides an hourly rate for such work to be conducted. The PUC would work with the contractor to develop a training plan and scope of work as part of the service transition. This training will principally involve PUC Customer Service Bureau Call Center staff, consisting principally of the following classifications: 1478, Senior Water Services Clerk and 1480, Principal Water Services Clerk.

- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
SFPUC Res 11-0027; May 2017 Growth Plan.
- 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 existing contractor under PSC 4141-11/12 will continue.

**7. Union Notification:** On 01/29/24, the Department notified the following employee organizations of this PSC/RFP request: SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Architect & Engineers, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4141-11/12

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfwater.org](mailto:shale@sfwater.org)  
**To:** [@Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [oumar.fall@seiu1021.org](mailto:oumar.fall@seiu1021.org); [cade.crowell@seiu1021.org](mailto:cade.crowell@seiu1021.org); [max.porter@seiu1021.org](mailto:max.porter@seiu1021.org); [sarah.wilson@seiu1021.org](mailto:sarah.wilson@seiu1021.org); [Sandeep.lal@seiu1021.me](mailto:Sandeep.lal@seiu1021.me); [leah.berlanga@seiu1021.org](mailto:leah.berlanga@seiu1021.org); [jegy.sering@seiu1021.org](mailto:jegy.sering@seiu1021.org); [matthew.torres@seiu1021.org](mailto:matthew.torres@seiu1021.org); [SF-DHR-Info@seiu1021.org](mailto:SF-DHR-Info@seiu1021.org); [najuawanda.daniels@seiu1021.org](mailto:najuawanda.daniels@seiu1021.org); [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org); [noah.frigault@sfgov.org](mailto:noah.frigault@sfgov.org); [Meyers, Julie \(HSA\)](mailto:Meyers,Julie.(HSA)); [thomas.vitale@seiu1021.org](mailto:thomas.vitale@seiu1021.org); [Ricardo.lopez@sfgov.org](mailto:Ricardo.lopez@sfgov.org); [Basconcillo, Kathy](mailto:Basconcillo,Kathy); [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net); [Wendy.Frigillana@seiu1021.org](mailto:Wendy.Frigillana@seiu1021.org); [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org); [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net); [davidmkersten@gmail.com](mailto:davidmkersten@gmail.com); [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org); [Sin.Yee.Poon@sfgov.org](mailto:Sin.Yee.Poon@sfgov.org); [david.canham@seiu1021.org](mailto:david.canham@seiu1021.org); [jtanner940@aol.com](mailto:jtanner940@aol.com); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [andrea@sfmea.com](mailto:andrea@sfmea.com); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [Criss@sfmea.com](mailto:Criss@sfmea.com); [Christina@sfmea.com](mailto:Christina@sfmea.com); [staff@sfmea.com](mailto:staff@sfmea.com); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [dho@ifpte21.org](mailto:dho@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [kpage@ifpte21.org](mailto:kpage@ifpte21.org); [eerbach@ifpte21.org](mailto:eerbach@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [Jackson, Shamica](mailto:Jackson,Shamica); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Modification Request to PSC # 4141-11/12 - MODIFICATIONS  
**Date:** Monday, January 29, 2024 9:13:55 AM

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

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$2,500,000 for services for the period January 29, 2024 – April 30, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/4753>

Email sent to the following addresses: [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org)  
[eerbach@ifpte21.org](mailto:eerbach@ifpte21.org) [kpage@ifpte21.org](mailto:kpage@ifpte21.org) [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org)  
[tmathews@ifpte21.org](mailto:tmathews@ifpte21.org) [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com) [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com)  
[ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com) [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org) [dho@ifpte21.org](mailto:dho@ifpte21.org)  
[mweirick@ifpte21.org](mailto:mweirick@ifpte21.org)  
[jharding@ifpte21.org](mailto:jharding@ifpte21.org) [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org) [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org) [staff@sfmea.com](mailto:staff@sfmea.com)  
[Christina@sfmea.com](mailto:Christina@sfmea.com) [Criss@SFMEA.com](mailto:Criss@SFMEA.com) [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org) [andrea@sfmea.com](mailto:andrea@sfmea.com)  
[amakayan@ifpte21.org](mailto:amakayan@ifpte21.org) [agarza@ifpte21.org](mailto:agarza@ifpte21.org) [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org)  
[jtanner940@aol.com](mailto:jtanner940@aol.com)  
[david.canham@seiu1021.org](mailto:david.canham@seiu1021.org) [Sin.Yee.Poon@sfgov.org](mailto:Sin.Yee.Poon@sfgov.org) [xiumin.li@seiu1021.org](mailto:xiumin.li@seiu1021.org)  
[davidmkersten@gmail.com](mailto:davidmkersten@gmail.com) [ted.zarzecki@seiu1021.net](mailto:ted.zarzecki@seiu1021.net) [pscreview@seiu1021.org](mailto:pscreview@seiu1021.org)  
[Wendy.Frigillana@seiu1021.org](mailto:Wendy.Frigillana@seiu1021.org) [pcamarillo\\_seiu@sbcglobal.net](mailto:pcamarillo_seiu@sbcglobal.net)  
[Kbasconcillo@sfwater.org](mailto:Kbasconcillo@sfwater.org) [Ricardo.lopez@sfgov.org](mailto:Ricardo.lopez@sfgov.org) [thomas.vitale@seiu1021.org](mailto:thomas.vitale@seiu1021.org)  
[Julie.Meyers@sfgov.org](mailto:Julie.Meyers@sfgov.org) [noah.frigault@sfgov.org](mailto:noah.frigault@sfgov.org) [jason.klumb@seiu1021.org](mailto:jason.klumb@seiu1021.org)



**From:** [Cade Crowell](#)  
**To:** [Kyger, Todd](#); [XiuMin Li](#)  
**Cc:** [Hale, Shawndrea M.](#)  
**Subject:** RE: Community Choice Aggregation (CCA) Back Office Services (CS-247)  
**Date:** Wednesday, March 6, 2024 4:00:23 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)  
[image005.png](#)

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Hi Todd,

We agree to waive the remaining review period for this PSC.

Thanks,

Cade Crowell (he/him)  
**SEIU 1021 Field Representative**  
(510) 679-8420

***Sign up to become a Union Member!***

<http://join1021.org?LUID=CCrowell>

---

**From:** Kyger, Todd <TKyger@sfwater.org>  
**Sent:** Monday, March 4, 2024 2:18 PM  
**To:** XiuMin Li <XiuMin.Li@seiu1021.org>; Cade Crowell <Cade.Crowell@seiu1021.org>  
**Cc:** Hale, Shawndrea M. <SHale@sfwater.org>  
**Subject:** Re: Community Choice Aggregation (CCA) Back Office Services (CS-247)

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

Hi XiuMin and Cade,

Just touching base on this Modification (Mod #5) to **PSC #4141 11/12 Community Choice Aggregation (CCA) Back Office Services (CS-247)** to see if Local 1021 is able to waive the remaining review period so that we might proceed with this item. Thank you.

Thank you,  
t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

**Workforce & Economic Program Services**

Cell: 415-308-0839

Pronouns: he, him, his

sfpuc.org | [tkyger@sfwater.org](mailto:tkyger@sfwater.org)



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**From:** Kyger, Todd <[TKyger@sfwater.org](mailto:TKyger@sfwater.org)>

**Date:** Wednesday, February 21, 2024 at 3:27 PM

**To:** XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>, Cade Crowell <[Cade.Crowell@seiu1021.org](mailto:Cade.Crowell@seiu1021.org)>

**Cc:** Hale, Shawndrea M. <[SHale@sfwater.org](mailto:SHale@sfwater.org)>

**Subject:** FW: Community Choice Aggregation (CCA) Back Office Services (CS-247)

We have a call set up next week. Please let me know if we should add this to our agenda, or if you are okay to waive the remainder of your review period so we can move this forward in the process as soon as possible. Thank you!

Thanks, t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

**Workforce & Economic Program Services**

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**From:** Kyger, Todd

**Sent:** Friday, February 2, 2024 3:21 PM

**To:** Cade Crowell <[Cade.Crowell@seiu1021.org](mailto:Cade.Crowell@seiu1021.org)>; XiuMin Li <[XiuMin.Li@seiu1021.org](mailto:XiuMin.Li@seiu1021.org)>

**Cc:** Hale, Shawndrea M. <[SHale@sfwater.org](mailto:SHale@sfwater.org)>

**Subject:** Community Choice Aggregation (CCA) Back Office Services (CS-247)

Hi XiuMin and Cade,

Please see the attached Modification (Mod #5) to **PSC #4141 11/12 Community Choice Aggregation (CCA) Back Office Services (CS-247)** for your review. If possible, kindly review and let us know if you have any questions or concerns. We would like to move this forward at the soonest possible opportunity and appreciate your consideration. Please reply letting us know if we are able to move this forward in the process. Happy to discuss if you would like more information.

Thanks, t

Todd Kyger  
Project Labor Agreement Administrator, Infrastructure  
**Workforce & Economic Program Services**  
Cell: 415-308-0839  
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# **Additional Attachment(s)**

# PUBLIC UTILITIES COMMISSION

City and County of San Francisco

RESOLUTION NO. 11-0027

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

WHEREAS, The SFPUC issued two Request for Proposals (RFPs) seeking suppliers to provide key services for CleanPowerSF; and

WHEREAS, The SFPUC RFPs were consistent with City policy and clearly stated the City's goals of meeting the state's Renewables Portfolio Standard, providing 51% renewable energy at prices that meet or beat PG&E rates, developing new renewable energy resources, and providing these benefits with no financial risk to the City; and

WHEREAS, Upon advice from LAFCO and the SFPUC, the first RFP was issued on November 5, 2009 for electricity supply, renewable project development and customer care and billing services; and

WHEREAS, In order to elicit the largest possible pool of respondents, the first RFP afforded respondents flexibility with respect to meeting certain City goals for CCA including the timeline to achieve the requested renewable portfolio content and development of new renewable resources; and

WHEREAS, The SFPUC received five (5) responses to the first RFP on December 29, 2009, from Fotowatio Renewable Ventures, Invenergy, LLC, Main Street Power, Power Choice, LLC, and Shell North America, but only two (2) of these included electricity supply; and

WHEREAS, Negotiations with the highest ranked proposer (Power Choice, LLC) were not successful; and

WHEREAS, A second RFP, CS-160, was issued on August 5, 2010, for electricity supply and customer care and billing services for CleanPowerSF, after the receipt of feedback from the SFPUC and LAFCO and a decision to provide for development of new renewable resources by the City through a separate process; and

WHEREAS, CS-160 stated that the "City has a goal of developing 360 MW of new energy resources" (p. 7 of CS-160, revised) pursuant to Ordinance 147-07 and that the City intends to conduct a process immediately for the development, construction and operation of green energy resources (including energy efficiency and demand side programs) located within the City as well as Northern California; and

WHEREAS, CS-160 was revised on September 30, 2010, to provide additional flexibility to potential respondents, including allowing firms to submit proposals to provide either electricity supply, or customer care and billing services or both, and reducing the credit rating requirement to Baa3/BBB-; and

WHEREAS, The SFPUC received four (4) responses to CS-160 on November 3, 2010, from Constellation Energy, Noble Americas, Power Choice, Inc, and Shell North America, and none met the minimum qualifications and minimum proposal requirements of the RFP; and

WHEREAS, On November 15, 2010, respondents were informed of the deficiencies in their proposals and were given until December 10, 2010, to supplement their proposals; and

WHEREAS, The revised proposals were received on December 10, 2010, and still failed to meet minimum qualifications and minimum proposal requirements set forth in the RFP, including a comprehensive pricing proposal that meets or beats PG&E rates; and

WHEREAS, in light of the failure of two RFP processes to result in an acceptable contract for electricity supply and customer care and billing services, the General Manager of the SFPUC has determined that the RFP could not be altered and reissued in a manner likely to attract responsive offers; and

WHEREAS, direct negotiations may identify alternatives for the provision of electricity supply and customer care and billing services for CleanPowerSF that are commercially reasonable and may meet many, if not all, of the City's core goals for a CCA program; and

WHEREAS, if such alternatives are identified, the General Manager could present such alternatives to this Commission, the LAFCO and the San Francisco Board of Supervisors for their review, consideration and, if appropriate, approval; now, therefore be it

RESOLVED, That this Commission hereby determines that all proposals received in response to CS-160: Electric Supply Services for Community Choice Aggregation (CCA) Program are non-responsive because no proposal met the RFP minimum qualifications and minimum proposal requirements; and be it

FURTHER RESOLVED, That the General Manager of the SFPUC is authorized to negotiate with one or more creditworthy entities, for power supply and customer care and billing services for CleanPowerSF in a manner that comes as close as possible to meeting core CCA goals of the City; and be it

FURTHER RESOLVED, That the commercially feasible contract terms utilized in the Marin Energy Authority's supplier contracts shall provide the basis to commence SFPUC negotiations; and be it

FURTHER RESOLVED, That the General Manager of the SFPUC shall direct SFPUC staff to develop a process, and scope of work, together with stakeholders and consultants, to request bids for renewable generation and green resource commitments to further the adopted City goals for CCA as described in Ordinance 147-07, shall initiate timely action on the process and scope of work, and shall report on the status of these efforts to the Commission by July 2011; and be it

FURTHER RESOLVED, That the General Manager of the SFPUC shall report to the Commission on the progress of these negotiations on no less than a quarterly basis with an expectation that a staff will bring a contract to the Public Utilities Commission and Board of Supervisors for approval by the end of the summer.

*I hereby certify that the foregoing resolution was adopted by the Public Utilities Commission at its meeting of* \_\_\_\_\_ *February 8, 2011*

A handwritten signature in cursive script, appearing to read "Michael J. Hardy".

\_\_\_\_\_  
*Secretary, Public Utilities Commission*

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000

PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

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

PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added

PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000

PSC Mod#3 Duration: no duration added

PSC Mod#4 Amount: \$11,000,000

PSC Mod#4 Duration: 11/01/21-10/31/24 (2 years 43 weeks)

PSC Cumulative Amount Proposed: \$33,100,000

PSC Cumulative Duration Proposed: 12 years 17 weeks

**1. Description of Work**

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

**C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.**  
4141-11/12



D. Will the contract(s) be renewed?

CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

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:

Contract CS-247(R), a three-year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 4 modifies the end date to 10/31/2024, which accommodates the second three-year renewal option.

## 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 contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Reason for the request for modification:

This service is necessary to ensure continuity of essential business services to CleanPowerSF's 380,000 customers. As the CleanPowerSF program continues to build its services to its customers, this service will be critical to maintaining billing and data management systems necessary to operate the program. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

## 3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol; (2) experience managing call center functions that rely on timely EDI information from PG&E to respond to potential customer queries;(3) experience with wholesale and retail electricity markets; and (4) experience/expertise in providing Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Which, if any, civil service class(es) normally perform(s) this work? 1478, Senior Water Services Clerk; 1480, Principal Water Services Clerk; 4310, Commercial Div Asst Sprv; 5601, Utility Analyst; 5602, Utility Specialist; 0922, Manager I;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide the necessary IT systems and software to support Customer Information Systems, perform billing calculations, and execute EDI transfer.

**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.

Existing resources with the necessary skills are not available, and the project timeframe and scope precludes recruitment, hiring and training new staff quickly enough. In particular, the need for significant additional call center resources during CleanPowerSF's enrollment period will greatly exceed the resources needed once the program is fully enrolled (call volumes spike during enrollment periods); to accommodate the high call volumes associated with the enrollment process, the contractor provides flexibility in staffing levels that is not possible with Civil Service Employees. Once call volume stabilizes, the PUC plans to incorporate CleanPowerSF call center operations currently provided under this contract into its Customer Service Bureau, and the contractor will provide an essential role in ensuring the success of this transition.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: As indicated above, certain functions performed under this contract can be performed by existing civil service classifications. After CleanPowerSF has completed citywide enrollment and enrollment-related call volumes have stabilized, the PUC plans to provide call center services with existing civil service classes. The PUC plans to hire additional staff to commence this process during the next two-year budget cycle. The PUC is analyzing the feasibility of bringing the billing and data management tasks provided by the contractor in-house. However, initial analysis indicates that the PUC will need to make significant investments in IT systems that are specific to CCA business processes, which the PUC currently does not own or operate. For this reason, it has been the PUC's determination that in the near-term it would not be practical to conduct these activities internally, and that using a contractor is the most efficient use of City resources. The PUC will continue to assess the feasibility of bringing contracted services in-house as the program matures.

**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; as part of the transition process to bring the call center operations in house, the contractor will continue to provide detailed training materials and both face-to-face and interactive web-based training on CCA program information as well as full system 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.

Yes. Res. 11-0027; May 2017 Growth Plan

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 existing contractor under PSC 4141-11/12 will continue.

7. **Union Notification:** On 06/04/21, the Department notified the following employee organizations of this PSC/RFP request:

SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Architect & Engineers, Local 21;

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

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

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

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4141-11/12

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 07/09/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000 PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000 PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$22,100,000 PSC Cumulative Duration Proposed: 9 years 26 weeks

**1. Description of Work**

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

**C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.**  
4141-11/12

**D. Will the contract(s) be renewed?**  
CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

**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:**  
Contract CS-247(R), a three year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 3 does not modify the end date of 12/31/21, which accommodates the first three-year renewable option.

**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 contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Reason for the request for modification:

This request will align the PSC amount and duration with the estimated Contract amount and duration. The requested additional funds will allow the PUC to continue to work with the contractor through the citywide enrollment period and to support increasing service under the contract from 80,000 accounts today to approximately 350,000 accounts by the end of 2019.

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

- A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol; (2) experience managing call center functions that rely on timely EDI information from PG&E to respond to potential customer queries;(3) experience with wholesale and retail electricity markets; and (4) experience/expertise in providing Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1478, Senior Water Services Clerk; 1480, Principal Water Services Clerk; 4310, Commercial Div Asst Sprv; 5601, Utility Analyst; 5602, Utility Specialist; 0922, Manager I;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide the necessary IT systems and software to support Customer Information Systems, perform billing calculations, and execute EDI transfer.

**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.  
Existing resources with the necessary skills are not available, and the project timeframe and scope precludes recruitment, hiring and training new staff quickly enough. In particular, the need for significant additional call center resources during CleanPowerSF's enrollment period will greatly exceed the resources needed once the program is fully enrolled (call volumes spike during enrollment periods); to accommodate the high call volumes associated with the enrollment process, the contractor provides flexibility in staffing levels that is not possible with Civil Service Employees. Once call volume stabilizes, the PUC plans to incorporate CleanPowerSF call center operations currently provided under this contract into its Customer Service Bureau, and the contractor will provide an essential role in ensuring the success of this transition.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: As indicated above, certain functions performed under this contract can be performed by existing civil service classifications. After CleanPowerSF has completed citywide enrollment and enrollment-related call volumes have stabilized, the PUC plans to provide call center services with existing civil service classes. The PUC plans to hire additional staff to commence this process during the next two-year budget cycle. The PUC is analyzing the feasibility of bringing the billing and data management tasks provided by the contractor in-house. However, initial analysis indicates that the PUC will need to make significant investments in IT systems that are specific to CCA business processes, which the PUC currently does not own or operate. For this reason, it has been the PUC's determination that in the near-term it would not be practical to conduct these activities internally, and that using a contractor is the most efficient use of City resources. The PUC will continue to assess the feasibility of bringing contracted services in-house as the program matures.

**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 contract provides an option for PUC to take call center operations in-house. This entails the contractor providing a Transition-Out Plan, including detailed training materials and both face-to-face and interactive web-based training on CCA program information as well as full system training. The contract does not specify a specific number of training hours but provides an hourly rate for such work to be conducted. The PUC would work with the contractor to develop a training plan and scope of work as part of the service transition. This training will principally involve PUC Customer

Service Bureau Call Center staff, consisting principally of the following classifications: 1478, Senior Water Services Clerk and 1480, Principal Water Services Clerk.

- 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. Res. 11-0027; May 2017 Growth Plan
- 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 existing contractor under PSC 4141-11/12 will continue.

**7. Union Notification:** On 02/23/18, the Department notified the following employee organizations of this PSC/RFP request: SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Architect & Engineers, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 4141-11/12

DHR Analysis/Recommendation:

05/21/2018

Commission Approval Required

Approved by Civil Service Commission

05/21/2018 DHR Approved for 05/21/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 47941 - 18/19)

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

Type of Service: Engineering Services for Sunol Valley Water Treatment Plant Long Term Taste & Odor (PRO.0120)

Funding Source: SFPUC Water Enterprise CIP

PSC Original Approved Amount: \$19,000,000 PSC Original Approved Duration: 10/01/19 - 10/01/26 (7 years 2 days)

PSC Mod#1 Amount: \$19,000,000 PSC Mod#1 Duration: 02/22/24-12/31/29 (3 years 13 weeks)

PSC Cumulative Amount Proposed: \$38,000,000 PSC Cumulative Duration Proposed: 10 years 13 weeks

**1. Description of Work**

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

SFPUC civil, structural, electrical; process, mechanical, and other specialized engineering services in the design and support during construction of a new raw water ozonation system, flocculant aid polymer system, and various needed upgrades at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues and plant reliability. Major plant upgrades include new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, backup power facilities, polymer mixing skids, polymer aging tanks, transfer pumps, polymer building, associated piping/appurtenances, and associated automatic controls (I&C), modifications to various existing facilities and systems, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load.

The scope also includes an upgrade to the Calaveras high voltage substation to accommodate increasing power needs brought on by the new ozonation system and various facility upgrades within the Sunol Valley and services of Technical Advisory Panels to review and provide expert opinion and recommendations during design and construction.

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

SFPUC is working on the Water System Improvement Program (WSIP), Sewer System Improvement Program (SSIP) and Capital Improvement Program (CIP). The engineering workload has substantially increased and consultants are needed to meet peak workload demands for planning, engineering design and construction support services on projects. This project requires special expertise in water treatment plant design and in particular, the raw water ozonation system, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and the need to have a long-term taste and odor system in place. If these services are not available, the project will not be completed to the highest quality and meet the project schedule. There is substantially more work than can be completed with in-house engineers within the planned schedule. Also, some of the services require expertise which is not available from City employees.

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

Services have been provided in the past through earlier PSC request. See 47941 - 18/19

D. Will the contract(s) be renewed?

No.

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

A project of this magnitude and complexity requires a seven-year contract. The planning phase will be 1.5 years and includes a Conceptual Engineering Report. The design phase will be 2 years and includes 35, 65, 95 and 100% design milestones with presentations at each milestone, preparation of Civic Design Review documents, engineer's estimates and construction schedules and documents needed for the California Environmental Quality Act (CEQA)

process. The bid and award phase will be .5 years and includes addendum preparation, review of Question of Bid Documents (QBD's), review of bids and participation in preconstruction meetings and activities. The construction phase will be 2.5 years and includes construction support services, review of Requests for Information (RFI), Submittals and Requests for Substitutions, attend weekly construction meetings, attend site visits, prepare designs related to change orders or RFI's, and preparation of an Operations and Maintenance (O&M) plan for the facility. The closeout phase will be .5 years and will include review of closeout documents, preparation of as-built Computer-Aided Design (CAD) drawings and closeout reports. In the event there are design or construction delays and/or follow-up sub projects, consultant services will be needed for design and construction support work, pushing the duration past the 6-year mark.

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

A. Display all that apply

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

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

Explain the qualifying circumstances:

As stated in Section 1B, this project requires special expertise in water treatment plant design and the ozonation process, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and need to have taste and odor control systems installed prior to the shutdowns.

B. Reason for the request for modification:

PRO.0120 is being modified to secure additional budget and schedule duration for engineering support services for the project construction phase. Since the contract began, there has been project scope and schedule changes that increased the budget and duration. A modification is needed to accommodate the changes.

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

A. Specify required skills and/or expertise: Experienced professional engineers in the structural, electrical, power, process, mechanical and civil disciplines during the design and construction phases of the new raw water ozonation system, substation upgrades and SVWTP improvements are needed. Areas of specialized engineering experience are needed for the ozonation and high voltage systems. In addition, process modifications downstream of the raw water ozonation process requires expertise in water treatment design. Design support services during the construction phase are needed to review RFI's, RFS' and submittals, address design changes and prepare operations and maintenance plans and as-built CAD drawings.

B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

The project requires special expertise in Ozonation and water treatment design, which is not available from City employees.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The specialized engineering expertise required for the project is not normally needed for projects and the level of resources needed is not long term. Adopting a new class for these specialized areas is not feasible.

**6. Additional Information**

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

No.



- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
In-house engineering staff will gain valuable knowledge and experience on this project. In addition to the knowledge transfer that will be provided as a result of working closely with the award firm, the consultant will also provide brown bag lunch presentations (one-hour each) throughout the term of the project. The target audience will be Water Enterprise, EMB and PMB staff. Planned topics will include in depth presentations on treatment technologies, facility operation and start-up, BIM, and/or lessons learned. These topics will benefit both the team directly assigned to the project, as well as additional staff across multiple departments.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 02/26/24, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47941 - 18/19

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/01/2024

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgwater.org](mailto:shale@sfgwater.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [dho@ifpte21.org](mailto:dho@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [ecassidy@ifpte21.org](mailto:ecassidy@ifpte21.org); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [kpage@ifpte21.org](mailto:kpage@ifpte21.org); [eerbach@ifpte21.org](mailto:eerbach@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Modification Request to PSC # 47941 - 18/19 - MODIFICATIONS  
**Date:** Monday, February 26, 2024 10:48:58 AM

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

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

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$19,000,000 for services for the period February 22, 2024 – December 31, 2029. 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/22083>

Email sent to the following addresses: [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org)  
[eerbach@ifpte21.org](mailto:eerbach@ifpte21.org) [kpage@ifpte21.org](mailto:kpage@ifpte21.org) [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org)  
[tmathews@ifpte21.org](mailto:tmathews@ifpte21.org) [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com) [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com)  
[ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com) [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org) [dho@ifpte21.org](mailto:dho@ifpte21.org)  
[mweirick@ifpte21.org](mailto:mweirick@ifpte21.org)  
[jharding@ifpte21.org](mailto:jharding@ifpte21.org) [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org) [jnuti@ifpte21.org](mailto:jnuti@ifpte21.org)  
[amakayan@ifpte21.org](mailto:amakayan@ifpte21.org)  
[agarza@ifpte21.org](mailto:agarza@ifpte21.org) [sportillo@ifpte21.org](mailto:sportillo@ifpte21.org) [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org)

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Engineering Services for Sunol Valley Water Treatment Plant Long Term Taste & Odor (PRO.0120)

Funding Source: SFPUC Water Enterprise CIP

PSC Amount: \$19,000,000

PSC Est. Start Date: 10/01/2019

PSC Est. End Date 10/01/2026

**1. Description of Work**

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

SFPUC civil, structural, electrical; process, mechanical, and other specialized engineering services in the design and support during construction of a new raw water ozonation system, flocculant aid polymer system, and various needed upgrades at SFPUC's Sunol Valley Water Treatment Plant (SVWTP) to address long-term taste and odor issues and plant reliability. Major plant upgrades include new cryogenic oxygen tanks, liquid oxygen vaporizers, ozone generators, ozone injectors, an ozone contactor, an ozone building, an ozone destruct system, electrical power facilities, backup power facilities, polymer mixing skids, polymer aging tanks, transfer pumps, polymer building, associated piping/appurtenances, and associated automatic controls (I&C), modifications to various existing facilities and systems, and power generation consisting of solar panels atop the Treated Water Reservoir and nearby SVWTP facilities to offset the increased power load.

The scope also includes an upgrade to the Calaveras high voltage substation to accommodate increasing power needs brought on by the new ozonation system and various facility upgrades within the Sunol Valley and services of Technical Advisory Panels to review and provide expert opinion and recommendations during design and construction.

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

SFPUC is working on the Water System Improvement Program (WSIP), Sewer System Improvement Program (SSIP) and Capital Improvement Program (CIP). The engineering workload has substantially increased and consultants are needed to meet peak workload demands for planning, engineering design and construction support services on projects. This project requires special expertise in water treatment plant design and in particular, the raw water ozonation system, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and the need to have a long-term taste and odor system in place. If these services are not available, the project will not be completed to the highest quality and meet the project schedule. There is substantially more work than can be completed with in-house engineers within the planned schedule. Also, some of the services require expertise which is not available from City employees.

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

Previous similar contracts include Agreement No. CS-879 (Engineering Project Design Services) for the Water System Improvement Program projects. The PSC No. for this Agreement is 4004-07/08.

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

No.

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

A project of this magnitude and complexity requires a seven-year contract. The planning phase will be 1.5 years and includes a Conceptual Engineering Report. The design phase will be 2 years and includes 35, 65, 95 and 100% design milestones with presentations at each milestone, preparation of Civic Design Review documents, engineer's estimates and construction schedules and documents needed for the California Environmental Quality Act (CEQA) process. The bid and award phase will be .5 years and includes addendum preparation, review of Question of Bid Documents (QBD's), review of bids and participation in preconstruction meetings and activities. The construction phase will be 2.5 years and includes construction support services, review of Requests for Information (RFI), Submittals and Requests for Substitutions, attend weekly construction meetings, attend site visits, prepare designs related to change orders or RFI's, and preparation of an Operations and Maintenance (O&M) plan for the facility. The closeout phase will be .5 years and will include review of closeout documents, preparation of as-built Computer-Aided Design (CAD) drawings and closeout reports. In the event there are design or construction delays and/or follow-up sub projects, consultant services will be needed for design and construction support work, pushing the duration past the 6-year mark.

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

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

As stated in Section 1B, this project requires special expertise in water treatment plant design and the ozonation process, which is not available from City employees. The project is also on a tight schedule for completion due to the Hetch Hetchy shutdowns and need to have taste and odor control systems installed prior to the shutdowns.

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

A. Specify required skills and/or expertise: Experienced professional engineers in the structural, electrical, power, process, mechanical and civil disciplines during the design and construction phases of the new raw water ozonation system, substation upgrades and SVWTP improvements are needed. Areas of specialized engineering experience are needed for the ozonation and high voltage systems. In addition, process modifications downstream of the raw water ozonation process requires expertise in water treatment design. Design support services during the construction phase are needed to review RFI's, RFS' and submittals, address design changes and prepare operations and maintenance plans and as-built CAD drawings.

B. Which, if any, civil service class(es) normally perform(s) this work? 5203, Asst Engr; 5207, Assoc Engineer; 5241, Engineer;

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

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

City resources will be utilized for various scope based on availability and the project schedule.

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

A. Explain why civil service classes are not applicable.

The project requires special expertise in Ozonation and water treatment design, which is not available from City employees.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. The specialized engineering expertise required for the project is not normally needed for projects and the level of resources needed is not long term. Adopting a new class for these specialized areas is not feasible.

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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. In-house engineering staff will gain valuable knowledge and experience on this project. In addition to the knowledge transfer that will be provided as a result of working closely with the award firm, the consultant will also provide brown bag lunch presentations (one-hour each) throughout the term of the project. The target audience will be Water Enterprise, EMB and PMB staff. Planned topics will include in depth presentations on treatment technologies, facility operation and start-up, BIM, and/or lessons learned. These topics will benefit both the team directly assigned to the project, as well as additional staff across multiple departments.

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No.

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

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

**7. Union Notification:** On 03/22/2019, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

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

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47941 - 18/19

DHR Analysis/Recommendation:

action date: 05/20/2019

Commission Approval Required

Approved by Civil Service Commission

05/20/2019 DHR Approved for 05/20/2019