**TEMPLATE B – Business Functionality – 425 Points**

**Note:** *Responses to questions in this template should be clear and concise. All responses to the sections 1 through 5 below may not exceed 15 pages in total. Marketing and sales-type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled with references to the appropriate section of the RFP or template section.*

# Certified Payroll – 225 Points

The system must allow for electronic submittal of payrolls by contractors and subcontractors for all work done on public works projects. Each payroll document must be able to be certified by electronic signatures. The system must also allow these payroll files to be imported into the system from data extracted from the contractor’s or subcontractor’s payroll system, to be directly entered into the system.

The system must monitor CPR for timeliness, completeness, and adherence to federal, state, and local laws. The vendor must maintain all applicable federal, state, and local prevailing wage rates including fringe benefits (single vs. double asterisk application of prevailing wage rate requirements) including, where necessary, predetermined increases. This prevailing wage data set will be used to evaluate submitted payroll information against the required rates for a project based on the correct wage determination date, job classification, rate and the bid advertisement date of the contract.

When the system identifies a potential violation, it must promptly alert the OLSE but not the contractor or subcontractor by displaying a flag associated with the violation where the information is stored. Flagged, potential violations must include but are not limited to: underpayment of wages, fringe benefits, or training funds, or that an apprentice does not have certificate from a state-approved program submitted in the system. The system must provide automated, customizable notification of non-compliance issues to stakeholders for each project or contract. For example, the underpayment of wages on a San Francisco Public Utilities Commission (SFPUC) project would notify OLSE and the SFPUC project manager but not the contractor that submitted the payroll. The system must also include the ability to record and track Substance Abuse Clearances, as specificied by the SFPUC Project Labor Agreement.

For contractors and subcontractors, the system must allow CPR data extraction or downloading in a format that can be uploaded to the California Department of Industrial Relations: <http://www.dir.ca.gov/public-works/certified-payroll-reporting.html>.

The system must provide authorized City users with the ability to create custom reports for any category of information contained within the system required for compliance or evaluated by City departments. The reports will include, but are not limited to, presenting data grouped by project attribute such as awarding body, contract value, bid advertisement date, contract award date, service territory (ZIP Code, Supervisorial District, Neighborhood), wages recovered, funding source, or capital program, or whether the project is active or closed.

The reporting functions must also enable analysis of worker information to assess compliance with the Davis-Bacon and Related Acts, H.U.D. Section 3 Program, Executive Order 11246, 41 CFR 60, and California Labor Codes 1776-1777, San Francisco Local Hiring ordinances and Project Labor Agreements such as the one for the San Francisco Public Utilities Commission (SFPUC).This system must allow City users to extract CPR reports across different time scales – year, project length, month, payroll period – produced as in Portable Document Format (PDF) and as Excel formats. The reports must include the ability to monitor Substance Abuse Clearances, as specificied by the SFPUC Project Labor Agreement, for individual workers and provide clearance summary reports that show the date each worker was cleared for substance abuse for projects (indiviually and multiple). These reports should include, but are not limited to, information about the project, contractor, and the date work was performed.

The General Process Map is attached as **Map A.**

<Response>

# Workforce Management – 125 Points

The WM component must allow the Office of Economic and Workforce Development (OEWD) to evaluate compliance with workforce hiring policies on public works and private projects, and manage workforce project data.

**Workforce Compliance Management:**

The system must allow for the evaluation of compliance with workforce hiring policies and requirements for workers and work hours on public works contracts and private construction projects. Workforce hiring policies include the H.U.D. Section 3 Program (Executive Order 11246, 41 CFR 60), the San Francisco Local Hiring Policy for Construction (San Francisco Administrative Code Chapter 82), the First Source Hiring Program (San Francisco Administrative Code Chapter 83), Federal Minorities and Females Participation Goals (Executive Order 11246), and the Office of Community Investment and Infrastructure’s Community Benefits Agreement for Contracting.

Specific to the Local Hiring Policy, the system must allow for contractors to submit Local Hire forms for OEWD’s review and approval as it relates to the Policy requirements. Specific to the H.U.D Section 3 Program, the system must allow for contractors to submit certification forms for businesses and workers. Certification of workers should also be validated through an address verification process that evaluates a worker’s home address against a list of addresses provided by the City.

The system must allow OEWD users the ability to generate customized reports to view data on worker demographics, project work hours, and contractors’ project workforce activities. The reports must include, but not be limited to, work hours by trade and classifications, work hours by contractor, individual worker hours, wages by trade and contractor, worker demographics (such as residency by county, city, zip code, and neighborhood, gender, race/ethnicity), and contractor hiring activity. Reports must also allow OEWD to generate data based on specific local areas by zip code. The system must also auto-calculate potential non-compliance penalties for Local Hire by determining correct prevailing wages by project and trade classifications and multiplying the number of Local Hire hours deficient by the correct wage rate to determine the penalty. The reports must have ability to export raw data as Excel and PDF file formats.

**Workforce Data Management:**

The system must allow OEWD to separately enter and manage workforce data information for workers, contractors, and projects which may or may not be in the Workforce Compliance section. The system must track data points including, but not limited to, worker demographics (name, date of birth, address, highest education, skills, work history, employment status, program activity enrolled in or completed OEWD program), project information (contacts for awarding body, contractor, and subcontractors, notes, hiring activity by contractor), and contractor information (contacts for individual contractor, notes, project and hiring activity by contractor).

The system must allow OEWD users to generate customized reports to view all data points and their relationships with ability to export raw data as Excel and PDF file formats. The system must also allow for reports created to be shared by specified users.

The Process Maps are attached as **Maps B and C.**

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# Labor Compliance Specifications - 50 Points

The OLSE seeks to develop a LC component that will track and manage the progress of local labor law investigations, settlements, and restitution payments for all laws OLSE enforces now or may enforce in the future. This component will be implemented after the CPR and WM are fully functioning. The selected contractor will develop and implement an LC component that integrates OLSE workflow. This cycle begins when OLSE evaluates a flagged potential violation from the system or receives a complaint about a possible violation of one or more laws it enforces. The cycle ends when the potential violation or complaint is determined to be invalid or is resolved through an enforcement action, usually ending with restitution payments to workers and/or payments of penalties to the City. The most common case process includes the following stages:

* Intake (source e.g.: worker complaint, site visit, or flag from CPR);
* Gathering information from the employer and employees, or for CPR, from the system;
* Conducting an audit/assessment of validity of the claim;
* Issuing findings to the employer (if violations are found);
* Settlement discussions with the employer; and
* Resolution / restitution payments made to workers and/or penalties paid to the City

The result of each case activity for all laws enforced, and in some cases multiple laws for a given compliance case, shall be collected by the LC system.

Categories of data to be tracked for each case include, but are not limited to:

* Contact information for employer representatives and employees;
* Complaint overview;
* Communications/correspondence with employers and employees;
* Case status;
* Restitution due; and
* Payments made

The LC system must automatically retrieve data entered to populate official OLSE enforcement correspondence letter template. Under the direction of OLSE, the Proposer’s system must be able to create, adjust, and integrate templates into the OLSE workflow process such that information contained in the system are merged into the template. This data includes but is not limited to the name of the project, the funding source, the contractor, contractor contact, worker contact information, and the amount of wages and penalties recovered. These templates, when sent to contractor, subcontractor, or employer, should be contained within the case that they are associated with. In addition, emails, sent templates, and related attachments must be automatically associated and stored with the case and process stage.

The LC system shall have customizable reporting that displays OLSE workflow of cases that includes but is not limited to: by law, case status as active, closed, wage and penalties recovered, awarding body, project status, contract value, award date, start date, service territory (ZIP Code, Supervisorial District, Neighborhood, etc.) and funding source/capital program.

The General Case Management Flow Map is attached as **Map D.**

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# Access, Permissions, and System Operations –15 Points

The system shall have secure, password protected login and access with user rights management controlled by City departments. The system must provide secure management of confidential and privileged information. This includes but is not limited to personal worker information, roles, and permissions for City awarding departments, compliance officers, contractors, subcontractors, and third party administration.

All authorized users of the system must be able to view, edit, and modify system data, submit, download, and upload CPR and other documents including but not limited to Section 3 certification and First Source documentation. This system must allow this to be done via PC/Apple computers or on iOS and Android mobile device application. In addition, preference will be given to systems that allow City staff to enter site visit and worker interview information directly into the system associated with the corresponding CPR, project, or case via PC/Apple computers or iOS/Android mobile device applications.

The City shall be able access and extract the data from the system in bulk, on demand, on a schedule determined by the City, and compatible with OpendataSF. The data must be in a machine-readable and non-proprietary format that does not require private software to read.

The system shall have the capacity to collect all data from public works projects, contractors, subcontractors, workforce management, and labor compliance. The system shall also have at least 99% guaranteed up time, and, in case of catastrophe or natural disaster, have all data backed up such that it can be restored immediately after the event.

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# Training – 10 Points

The selected vendor shall conduct ongoing, in-person training for construction contractors’ and subcontractors’ to facilitate simple submittal of Certified Payroll via web or mobile device application with documentation that explains the requirements of submittal and instructions on how to do so. The training and instruction must also show contractors and subcontractors how to submit payrolls to the California Department of Industrial Relations’ eCPR system.

The vendor shall also provide training for City staff with an electronic manual as part of a general knowledge transfer. The electronic manual must cover all aspects of the system, and shall be regularly updated to reflect any and all system upgrades and new functions. City staff must be trained to use all functions of the systems and be able to design and produce custom reports that meet the needs of each department.

The vendor shall provide live telephone support for all users during normal business hours (8:00 am to 5:00 pm Pacific Time) and preference will be given to vendors that also provide online live webchat support.

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