

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: As-Needed Recruitment Services

Funding Source: TBD - Based on the Enterprise or Bureau

PSC Duration: 3 years

PSC Amount: \$300,000

1. Description of Work

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

The Consultant will assist SFPUC in conducting a nationwide search to fill the high-level positions which are critical to the San Francisco Public Utilities Commission (SFPUC) by recruiting candidates, screening candidates, conducting interviews, vetting candidates and assisting in negotiations. Staff from the proposed Recruitment Services Firm will meet with Executive Staff and other stakeholders of the SFPUC to determine the core competencies, prepare a work plan with detailed timeline to conduct a search and identify top qualified candidates.

Additional activities include, but are not limited to the following Task Descriptions (1-5): 1) Meet with subject matter experts to obtain in-depth knowledge of position requirements, organizational needs, competencies and ideal candidate; 2) Develop recruitment strategy including development of refined job description, developing advertisement materials and diversity strategy; 3) Build candidate pool and source candidates through active recruitment and network; 4) Present candidate pool to organization, vetting candidate qualifications, conduct reference / background checks; 5) Establish final selection process with SMEs and work with organization to make a selection.

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

This service is critical to the ongoing operations of the SFPUC as the organization provides quality drinking water and wastewater services to the city of San Francisco, wholesale water to three Bay Area counties, and green hydroelectric and solar power to our municipal departments. The inability to secure top talent to fill key positions at the SFPUC can have an adverse impact operations throughout the agency creating safety and financial liabilities and cause for PUC to fall out of compliance with policies, laws and regulations.

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 # 38403-17/18 Executive Search Services

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:

This work is very specialized and the consultant selected depends on the type of position that needs to be filled. This work is not necessarily needed on a continued basis and the needs fluctuate due to several factors.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Expertise in high level executive recruitments with nationwide reach; have a good understanding of the political climate; strong relationships with top level government, nonprofit, and private sector executives; experience working with professional utilities related agencies; experience conducting nationwide executive searches; ability to invest resources needed to ensure a successful executive search.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1250, Recruiter;
- 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?

We have requested to use DHRs existing executive search firm contract.

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

- A. Explain why civil service classes are not applicable.
Classified civil service positions do not require the depth and breadth of experience and networks that consultants provide in conducting searches for top level leadership positions. PUC Human Resources analysts will collaborate with the executive search firms around the recruitment and selection process and ensure that recruitment processes comply with City and County of San Francisco policy, processes and procedures. The City and County employees do not have the network, candidate databases and recruitment strategy that an executive search firm will have.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. This work is very specialized and the consultant selected depends on the type of position that needs to be filled. This work is not necessarily needed on a continued basis and the needs fluctuate due to several factors such as the labor market, retirement eligibility status, operational needs and line of 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.
No. Although no formal training will be provided to City and County employees, city staff will learn industry best practices and standards for recruiting through working with the executive search firm.
- 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 03/14/2022, 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 Avenue 8th Floor San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48569 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

From: dh-pscordinator@sfgov.org on behalf of shale@sfgwater.org
To: Hale, Shawndrea M.; [Laxamana, Junko \(BOS\)](mailto:Laxamana, Junko (BOS)); WendyWong26@yahoo.com; wendywong26@yahoo.com;
tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org;
L21PSCReview@ifpte21.org; Hale, Shawndrea M.; dh-pscordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 48569 - 21/22
Date: Monday, March 14, 2022 2:48:24 PM

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 48569 - 21/22 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 48569 - 21/22 for \$300,000 for Initial Request services for the period 11/01/2022 – 10/31/2025. 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/18117> 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 UTILITIES COMMISSIONDept. Code: PUCType of Request: Initial Modification of an existing PSC (PSC # 38403 - 17/18)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Executive Search Services (PRO.0100)Funding Source: Wastewater & Power EnterprisesPSC Original Approved Amount: \$66,000PSC Original Approved Duration: 11/30/17 - 11/30/19 (2 years)PSC Mod#1 Amount: \$100,000PSC Mod#1 Duration: 12/01/19-03/30/20 (17 weeks 1 day)PSC Mod#2 Amount: \$80,000PSC Mod#2 Duration: no duration addedPSC Cumulative Amount Proposed: \$246,000PSC Cumulative Duration Proposed: 2 years 17 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The proposed Executive Search Firm will conduct nationwide searches to fill the Assistant General Manager (AGM) position of Wastewater Enterprise (WWE) and the Deputy AGM of Power Enterprise. These two positions are critical at the San Francisco Public Utilities Commission (SFPUC). Staff from the proposed Executive Search Firm will meet with Executive Staff of the SFPUC to determine the core competencies, prepare a work plan with detailed timeline to conduct executive searches and identify top notch candidates.

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

The AGM for WWE and the Deputy AGM for Power Enterprise positions are key to the SFPUC. Securing services provided by the proposed Executive Search Firm is essential to ensure that top notch candidates, with the skill-set needed are recruited for these positions. Lack of top talent to fill these key positions at the SFPUC can have devastating consequences for the Wastewater and Power Enterprises of the SFPUC as it can negatively impact operations of the sewer services and the implementation of Power initiatives at the SFPUC.

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 38403 - 17/18

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The Wastewater Enterprise AGM position was recently vacated and the General Manager has requested the services of an Executive Search Firm to ensure that best potential candidates are identified for this position. This is a critical and key position to fill. Also, Power Enterprise is in the process of implementing new initiatives and expanding services provided. The Deputy AGM, Power position requires a high level of expertise in the new and expanded areas of power. The field is very competitive and there is a shortage of leaders with the skill set needed for this top level position in the Power Enterprise.

B. Reason for the request for modification:

Additional executive level recruitment searches are required. Consultant will assist in the recruitment for executive level positions at the SFPUC. The Consultant will meet with SFPUC to determine the core competencies, prepare the work plan with detailed timeline to conduct executive searches and identify qualified candidates. Project tasks include: (1) Active Recruitment, (2) Direct Contact, (3) Advertisement, (4) Candidate Evaluation, (5) Progress Report Meeting, (6) Preliminary Interviews, (7) Interviews, and (8) As-needed Services.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Expertise in high level executive recruitments; have a good understanding of the political climate; strong relationships with top level government, nonprofit, and private sector executive; experience working with professional power related agencies; experience conducting nationwide executive searches; ability to invest resources needed to ensure a successful executive search.

B. Which, if any, civil service class(es) normally perform(s) this work? 1250, Recruiter;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will be using their own resources, tools and network to reach out to potential candidates on a nationwide basis.

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 is currently class 1250 Recruiter, which performs some of the duties identified by the consultant; however, positions in this class do not require the depth and breadth of experience that consultants provide in conducting executive searches for top level leadership positions.

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: Creation of new classes is

managed by the Department of Human Resources at City and County of San Francisco (CCSF). The need for executive searches is sporadic and performed on as needed basis. Recommendation to create a new class is not supported by the current needs.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
The contractor will be conducting executive searches which do not require training staff. Contractor will be working with Human Resources Services staff in coordinating recruitment and selection activities.

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.
Alliance Resource Consulting, LLC

7. Union Notification: On 02/20/19, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 38403 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 03/05/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 38403 - 17/18)

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

Type of Service: Executive Search Services (PRO.0100)

Funding Source: Wastewater & Power Enterprises

PSC Original Approved Amount: \$66,000 PSC Original Approved Duration: 11/30/17 - 11/30/19 (2 years)

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: 12/01/19-03/30/20 (17 weeks 1 day)

PSC Cumulative Amount Proposed: \$166,000 PSC Cumulative Duration Proposed: 2 years 17 weeks

1. Description of Work

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

The proposed Executive Search Firm will conduct nationwide searches to fill the Assistant General Manager (AGM) position of Wastewater Enterprise (WWE) and the Deputy AGM of Power Enterprise. These two positions are critical at the San Francisco Public Utilities Commission (SFPUC). Staff from the proposed Executive Search Firm will meet with Executive Staff of the SFPUC to determine the core competencies, prepare a work plan with detailed timeline to conduct executive searches and identify top notch candidates.

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

The AGM for WWE and the Deputy AGM for Power Enterprise positions are key to the SFPUC. Securing services provided by the proposed Executive Search Firm is essential to ensure that top notch candidates, with the skill-set needed are recruited for these positions. Lack of top talent to fill these key positions at the SFPUC can have devastating consequences for the Wastewater and Power Enterprises of the SFPUC as it can negatively impact operations of the sewer services and the implementation of Power initiatives at the SFPUC.

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 service is currently being provided via PSC No. 38403 - 17/18.

D. Will the contract(s) be renewed?

No.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The Wastewater Enterprise AGM position was recently vacated and the General Manager has requested the services of an Executive Search Firm to ensure that best potential candidates are identified for this position. This is a critical and key position to fill. Also, Power Enterprise is in the process of implementing new initiatives and expanding services provided. The Deputy AGM, Power position requires a high level of

expertise in the new and expanded areas of power. The field is very competitive and there is a shortage of leaders with the skill set needed for this top level position in the Power Enterprise.

B. Reason for the request for modification:

To provide Executive Search Services for SFPUC's Power Enterprise management positions.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Expertise in high level executive recruitments; have a good understanding of the political climate; strong relationships with top level government, nonprofit, and private sector executive; experience working with professional power related agencies; experience conducting nationwide executive searches; ability to invest resources needed to ensure a successful executive search.

B. Which, if any, civil service class(es) normally perform(s) this work? 1250, Recruiter;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will be using their own resources, tools and network to reach out to potential candidates on a nationwide basis.

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 is currently class 1250 Recruiter, which performs some of the duties identified by the consultant; however, positions in this class do not require the depth and breadth of experience that consultants provide in conducting executive searches for top level leadership positions.

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: Creation of new classes is managed by the Department of Human Resources at City and County of San Francisco (CCSF). The need for executive searches is sporadic and performed on as needed basis. Recommendation to create a new class is not supported by the current needs.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The contractor will be conducting executive searches which do not require training staff. Contractor will be working with Human Resources Services staff in coordinating recruitment and selection activities.

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.
Alliance Resource Consulting, LLC

7. **Union Notification:** On 06/25/18, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 38403 - 17/18

DHR Analysis/Recommendation:

08/06/2018

Commission Approval Required

Approved by Civil Service Commission

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

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: Construction Management (CM) Staff Augmentation Services for the Treasure Island Wastewater Tr

Funding Source: Sewer System Improvement Program (SSIP) PSC Duration: 4 years 48 weeks

PSC Amount: \$8,000,000

1. Description of Work

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

The San Francisco Public Utilities Commission (SFPUC), a department of the City and County of San Francisco ("City"), seeks to retain the services of a qualified Proposer to provide construction management (CM) staff augmentation services for the Treasure Island Wastewater Treatment Plant (TIWWTP). As part of the SFPUC's Sewer System Improvement Program (SSIP), the existing Treasure Island Wastewater Treatment Plant will be replaced with a new wastewater treatment plant to provide reliable wastewater services for the island and to provide for the growing population. The CM staff augmentation services required for the TIWWTP Project includes construction resident engineering and office engineering services, field contract administration, construction contract administration, construction inspection, environmental inspection and project controls services. The SFPUC will manage the staff augmentation team during the construction phase of this project for a duration under 5 years.

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

The SFPUC does not have the staff resources to perform the required work. These services are needed to ensure compliance with contract specifications, drawings and procedures. Due to the unique complexities of the design and construction required for the Project, the City has determined that the Project requires specialized expertise and skill. If denied, there would not be adequate staff and the necessary CM expertise to manage the construction of this new treatment plant, thus increasing the overall likelihood of poor construction and inadequate performance of the TIWWTP Project.

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.

N/A

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.

N/A

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 skills and expertise required for this scope are directly related to construction management (CM) work in the following CM areas: construction administration and change management; construction inspection (general, warranty, & specialty); project controls (cost and schedule); special inspection (coating, welding, geotechnical, marine, tunnel, etc.); supplier quality surveillance; special laboratory testing; testing, startup, & commissioning assistance; surveying; construction safety inspection; and technical data entry and document control including engineering archives. In addition, and to the extent possible, City staff will be utilized to provide CM services for the SFPUC's SSIP construction projects. However, additional resources will be required on an as-needed basis to help accommodate peak workloads during relatively short-term capital projects and to provide specialized expertise for the anticipated work.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Construction management skills include contract administration, inspection services, contracts management, and project controls with expertise in wastewater treatment facility construction, specifically treatment plant construction, including: contractor means and methods, safety regulations, water quality standards, compliance with State and Federal regulations applicable to the treatment and disposal of sewage and storm water runoff, system shutdowns and start-up procedures, equipment and performance testing, compliance with the latest building codes, and claims expertise. These specialized skills and knowledge are essential for building the wastewater treatment plant and maintaining treatment services for San Francisco customers during the overall construction period.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1426, Senior Clerk Typist; 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5241, Engineer; 6318, Construction Inspector; 6319, Senior Const Inspector;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

The SFPUC has discussed with San Francisco Public Works (SFPW) the potential for obtaining CM services by using its available resources. The SFPUC has previously used and is currently using SFPW resources to support the operation, maintenance, and repair of its existing wastewater treatment facilities located primarily at the Southeast and Oceanside Water Pollution Control Plants but also located throughout San Francisco. For example, SFPW has partnered with the SFPUC to provide all CM staffing resources for its North Shore Pump Station Wet Weather Improvements Project, a project for which professional CM services were originally sought. The SFPUC will continue to partner with SFPW, but on a larger scale, the SFPUC will need to augment its existing CM staffing resources to meet the specialized needs and peak workload demands of SSIP construction projects.

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

A. Explain why civil service classes are not applicable.

Some work can and will be done by City staff whenever possible. This is a request to “augment” City staff on intermittent, short duration work when City staff is otherwise tasked. Current civil service staff are not always able to perform this scope of services because they don’t always have the specialized experience and/or knowledge required to adequately manage the construction of a large, complex wastewater treatment plant, such as the TIWWTP Project. Construction Engineers and Inspectors are needed to perform the construction management work, and for a wastewater treatment plant, these positions also require specialized skills in the areas of coating inspection, instrumentation & control (I&C), electrical engineering and electrical inspection, and testing, startup, and commissioning. The level of CM resources required for the TIWWTP Project is not a long-term need that would warrant the hiring of new SFPUC personnel; these CM positions are needed in part due to peak workload staffing requirements resulting from the increase of SSIP construction projects in the next 4-8 years. Except for the Project Construction Manager, who’s an SFPUC staff person, the contract is meant to fully augment the project CM team. Once project construction begins, and if an SFPUC or SFPW staff person becomes available, then that person may be assigned to the project to gain experience and training for similar work on future construction projects.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. The specialized needs of construction management for the TIWWTP Project, are not consistent (steady) or long enough in duration to make it feasible to adopt a new civil service class.

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. Except for the Project Construction Manager, who’s an SFPUC staff person, the contract is meant to fully augment the project CM team. Once project construction begins, and if an SFPUC or SFPW staff person becomes available, then that person may be assigned to the project to gain experience and training for similar work on future construction projects

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 02/10/2022, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48718 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfgwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); noah.frigault@sfgov.org; Julie.Meyers@sfgov.org; thomas.vitale@seiu1021.org; Ricardo.lopez@sfgov.org; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; david.canham@seiu1021.org; jtanner940@aol.com; [Laxamana, Junko \(BOS\)](mailto:Laxamana,Junko(BOS)); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhr-psccordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 48718 - 21/22
Date: Thursday, February 10, 2022 10:01:35 AM

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

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

RECEIPT for Union Notification for PSC 48718 - 21/22 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 48718 - 21/22 for \$8,000,000 for Initial Request services for the period 10/01/2022 – 09/01/2027. 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/17908> 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 - TECHNOLOGY -- TIS

Dept. Code: TIS

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

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

Type of Service: Captioning Services

Funding Source: General Fund

PSC Amount: \$6,000,000

PSC Est. Start Date: 03/09/2022

PSC Est. End Date 12/31/2027

1. Description of Work

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

This contract will consist of services for captioned text added to video for the City's Board of Supervisors' meetings, Mayor's press conferences, 14 City commissions video tape, and cablecast by the San Francisco Government Television (SEGovTV) on cable channels 26 and 78. Closed caption text will also be added to the original programs produced by SFGovTV for City departments.

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

The closed caption text is necessary for the City to comply with the Federal Americans with Disabilities Act (ADA). Closed captioning provides equal access to city government hearings and proceedings to people with hard of hearing conditions and to the hearing impaired. Denial would jeopardize the City's obligations under the ADA and compromise our efforts in ensuring that the City and its programs are fully accessible by people with disabilities.

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 services were rendered by a vendor approved by the Civil Service Commission, PSC 47902-15/16.

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 request is needed in the foreseeable future for the City to comply with the Federal American Disabilities Act (ADA).

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:

Real time captioning requires additional training and operations of computer software to encode text to video. The City does not have City staff trained with the proficiency to comply with the Federal American Disabilities Act to provide real time captioning for City Board of Supervisors and commission meetings. Finally, the lengths of meetings are unpredictable and can range from 30 minutes to 10 plus hours making it prohibitive for City staff to conform to its normal working hours.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A Real-time captioner must be able to caption at a minimum rate of 225 wpm and must have strong vocabulary and language skills. Captionists must accurately convey the dialogue and other audio information in the program. The captions must be spelled correctly and be reasonably in synch with program audio.

B. Which, if any, civil service class(es) normally perform(s) this work? 1769, Media Production Supv;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, because SFGovTV facilities does not have the space for on-site personnel or equipment, but the work will be closely coordinated with the vendor.

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

There is no civil service class that normally performs this work. Real time captioning requires additional training and operations of computer software to encode text to video.

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

- A. Explain why civil service classes are not applicable.
There is no civil service class that normally performs this work. Real time captioning requires additional training and operations of computer software to encode text to video.
- 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. Due to the amount of meetings video taped by SFGovTV, it would not be feasible to have on-site staff. The lengths of meetings are unpredictable and can range from 30 minutes to 10 plus hours.

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 because the City cannot transition this work to City staff. The City does not have the equipment nor the expertise to complete this task and fully comply with the American Disabilities Act.
- 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 03/09/2022, the Department notified the following employee organizations of this PSC/RFP request:
Theatrical Stage Employees, L16

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

Name: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

Address: One South Van Ness Ave., 2nd Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41485 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of jolie.gines@sfgov.org
Sent: Wednesday, March 9, 2022 4:27 PM
To: Gines, Jolie (TIS); sal@local16.org; jb@local16.org; Gines, Jolie (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 41485 - 21/22

RECEIPT for Union Notification for PSC 41485 - 21/22 more than \$100k

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a request for a Personal Services Contract (PSC) 41485 - 21/22 for \$6,000,000 for Initial Request services for the period 03/09/2022 – 12/31/2027. 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/18085> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY -- TISDept. Code: TISType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: SFGovTV Captioning ServicesFunding Source: General FundsPSC Amount: \$3,000,000PSC Est. Start Date: 09/06/2016PSC Est. End Date 06/30/2021**1. Description of Work**

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

This contract will consist of services for captioned text added to video for the City's Board of Supervisors' meetings, Mayor's press conferences, 14 City commissions video tape, and cablecast by the San Francisco Government Television (SEGovTV) on cable channels 26 and 78. Closed caption text will also be added to the original programs produced by SFGovTV for City departments.

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

The closed caption text is necessary for Americans with Disabilities Act (ADA) compliance. It provides equal access to city government hearings and proceedings to people with hard of hearing conditions and to the hearing impaired. Denial would jeopardize the City's obligations under the ADA and compromise our efforts in ensuring that the City and its programs are fully accessible to and useable by people with disabilities.

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 services were rendered by a vendor approved by the Civil Service Commission under 4099-11/12.

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.

These services will always be needed because of the Federal requirement to comply with the ADA regulations.

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 City does not have the equipment to complete this initiative.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A Real-time captioner must be able to caption at a minimum rate of 225 wpm and must have strong vocabulary and language skills. Captionists must accurately convey the dialogue and other audio information in the program. The captions must be spelled correctly and be reasonably in synch with program audio.

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, because SFGovTV facilities does not have the space for on-site personnel, but the work will be closely coordinated with the vendor.

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

City?

There is no civil service class that normally performs this work. Real time captioning requires additional training and operations of computer software to encode text to video.

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

A. Explain why civil service classes are not applicable.

There is no civil service class that normally performs this work. Real time captioning requires additional training and operations of computer software to encode text to video.

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., Due to the amount of meetings video taped by SFGovTV, it would not be feasible to have on-- site staff. The lengths of meetings are unpredictable and can range from 30 minutes to 10 plus hours.

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.

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

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

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

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

7. Union Notification: On 07/26/2016, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

Address: One South Van Ness Ave., 2nd Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47902 - 15/16

DHR Analysis/Recommendation:

action date: 09/19/2016

Commission Approval Required

Approved by Civil Service Commission

09/19/2016 DHR Approved for 09/19/2016

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS

Dept. Code: TIS

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

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

Type of Service: Video Streaming Services

Funding Source: General Fund

PSC Amount: \$1,000,000

PSC Est. Start Date: 07/01/2022

PSC Est. End Date
06/30/2027

1. Description of Work

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

To expand its services and to provide equal access to all residents of the City. SFGovTV simulcasts its content on the internet. SFGovTV seeks a vendor that can:

1. Video stream the SFGovTV channel live 24/7.
2. Host SFGovTV video content for on-demand viewing.
3. Conserve the City's bandwidth.
4. Increase the quality of the live stream.
5. Provide universal format delivery to PC, MAC and mobile platforms.
6. Add additional functions to improve usability of SFGovTV archive content.

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

SFGovTV is required to comply with the Americans with Disabilities Act (ADA) provide video streaming for the general public and Americans with Disabilities Act (ADA)-related access to official City business as well as City and County of San Francisco feature programming.

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 video streaming service has been provided by a supplier who was awarded the RFP and approved by PSC 45047 - 16/17.

D. Will the contract(s) be renewed?

Yes, the City will continue to need video streaming services. This service was never more vital during the pandemic when all City Board of Supervisors and commission meetings were live streamed.

- 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:

SFGovTV is required to comply with the Americans with Disabilities Act (ADA) provide video streaming for the general public and Americans with Disabilities Act (ADA)-related access to official City business as well as City and County of San Francisco feature programming. In addition, the City and County of San Francisco has outsourced these required services since 2007 because hardware and software advancements over time make this specialized work difficult to justify bringing in-house to the Department of Technology.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Expert knowledge of video streaming equipment and multi-platform software technologies.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1769, Media Production Supv;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, mobile encoding, indexing, storage, and high-definition audio and video equipment. Closed captioning equipment may also be offered by vendors.

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

The City and County of San Francisco has outsourced these required services since 2007. Hardware and software advancements over time make this specialized work difficult to justify bringing in-house to the Department of Technology.

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

- A. Explain why civil service classes are not applicable.
Real-time events may require off-site or extended programming hours that would be difficult to plan and schedule for regular civil service classes.

- 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 classes already exist but this specialized work, including the advances in technology makes it difficult to justify bringing in-house to the Department of Technology. In addition, off-site and extended programming hours may not conform to regular civil service employee work hours.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training is required due to the limited overlap between SFGovTV production performed in-house, and the post-production services required.
- 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 03/04/2022, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Theatrical Stage Employees, L16

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

Name: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

Address: One South Van Ness Ave., 2nd Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42675 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of jolie.gines@sfgov.org
Sent: Friday, March 4, 2022 5:06 PM
To: Gines, Jolie (TIS); sal@local16.org; jb@local16.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Gines, Jolie (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42675 - 21/22

RECEIPT for Union Notification for PSC 42675 - 21/22 more than \$100k

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a request for a Personal Services Contract (PSC) 42675 - 21/22 for \$2,500,000 for Initial Request services for the period 07/01/2022 – 06/30/2027. 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/18069> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - TECHNOLOGY

Dept. Code: TIS

Type of Request: Initial Modification of an existing PSC (PSC # 45047 - 16/17)

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

Type of Service: Video streaming

Funding Source: Departmental budget

PSC Original Approved Amount: \$250,000 PSC Original Approved Duration: 12/15/16 - 12/14/21 (5 years)

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: 07/01/21-06/30/22 (28 weeks 1 day)

PSC Mod#2 Amount: \$100,000 PSC Mod#2 Duration: 07/01/22-06/30/23 (1 year)

PSC Cumulative Amount Proposed: \$450,000 PSC Cumulative Duration Proposed: 6 years 28 weeks

1. Description of Work

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

To expand its services and to provide equal access to all of the residents of the City, SFGovTV simulcasts its content on the internet. SFGovTV seeks a vendor that can:

1. Video stream the SFGovTV channel live 24/7.
2. Host SFGovTV video content for on-demand viewing.
3. Conserve the City's bandwidth.
4. Increase the quality of the live stream.
5. Provide universal format delivery to PC, MAC and mobile platforms.
6. Add additional functions to improve usability of SFGovTV archive content.

Scope Change

The supplier provides streaming services of all City Board of Supervisors and Commission meetings. The agreement is needed for the City to expand its services and to provide equal access to all San Francisco residents, and for SFGovTV to simulcasts its content on the internet. Streaming services has proven to be vital

service during the pandemic when the City's Board of Supervisors and Commission meetings were all being held virtually. The SFGovTeam had hoped to develop a scope of work for the new RFP, but the pandemic limited their time to complete their task because they were assisting the Board of Supervisors and City Commissions to successfully set up their virtual environment.

- B. Explain why this service is necessary and the consequence of denial:
SFGovTV requires video streaming to provide general and Americans with Disabilities Act (ADA)-related access to official City business as well as City and County of San Francisco feature programming.
- 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 Dec 5 2016
- 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 agreement is needed for the City to expand its services and to provide equal access to all San Francisco residents, and for SFGovTV to simulcasts its content on the internet.

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 City and County of San Francisco does not possess or intend to acquire specialized equipment to perform video streaming and storage.

B. Reason for the request for modification:

The supplier provides streaming services of all City Board of Supervisors and Commission meetings. The agreement is needed for the City to expand its services and to provide equal access to all San Francisco residents, and for SFGovTV to simulcasts its content on the internet. Streaming services has proven to be vital service during the pandemic when the City's Board of Supervisors and Commission meetings were all being held virtually.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Expert knowledge of video streaming equipment and multi-platform software technologies.
- 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: mobile encoding, indexing, storage, and high-definition audio and video equipment. Closed captioning equipment may also be offered by vendors.

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.

Real-time events may require off-site or extended programming hours that would be difficult to plan and schedule for regular civil service classes.

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.

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 due to the limited overlap between SFGovTV production performed in-house, and the post-production services required.

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

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

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

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Yes, the City is exercising its option to extend the agreement

7. Union Notification: On 03/31/22, 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: Jolie Gines Phone: 628 652 5074 Email: jolie.gines@sfgov.org

Address: One South Van Ness, 2d floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45047 - 16/17

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/02/2022

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 49631 - 20/21)

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

Type of Service: TIRE LEASE AND ASSOCIATED SERVICES

Funding Source: Operating Funds

PSC Original Approved Amount: \$9,800,000

PSC Original Approved Duration: 10/01/21 - 09/30/24 (3 years)

PSC Mod#1 Amount: \$100,000

PSC Mod#1 Duration: 05/01/22-04/30/27 (2 years 30 weeks)

PSC Cumulative Amount Proposed: \$9,900,000

PSC Cumulative Duration Proposed: 5 years 30 weeks

1. Description of Work

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

The contractor will lease, service and dispose of all tires used by the San Francisco Municipal Transit Agency (SFMTA) on all rubber-tire revenue vehicles. The SFMTA's rubber tire revenue fleet comprised of buses and trolleys that transport the public: diesel, hybrid buses and electric trolleys. The contractor, the will be responsible for; manufacturing, procuring and transporting a sufficient supply of tires as required to guarantee continuity of service; mounting and dismounting tires on and from the rim, balancing tires, changing wheels/rims maintaining proper tire pressure; recapping rear tires, providing emergency road-side service 24 hour / 7 days-a-week; conducting monthly maintenance checks on all tires providing required tools and equipment not furnished by SFMTA; and performing in-depth tracking of the tires through all stages, including the federally-regulated disposal of thousands of tires. In addition, the contractor is responsible for following all federally mandated regulations and guidelines and maintaining all required licenses.

Scope Change

The contractor will lease, service and dispose of all tires used by the San Francisco Municipal Transit Agency (SFMTA) on all rubber-tire revenue vehicles. The SFMTA's rubber tire revenue fleet comprised of buses and trolleys that transport the public: diesel, hybrid buses and electric trolleys. The contractor, the will be responsible for; manufacturing, procuring and transporting a sufficient supply of tires as required to guarantee continuity of service; mounting and dismounting tires on and from the rim, balancing tires, changing wheels/rims maintaining proper tire pressure; recapping rear tires, providing emergency road-side service 24 hour / 7 days-a-week; conducting monthly maintenance checks on all tires providing required tools and equipment not furnished by SFMTA; and performing in-depth tracking of the tires through all stages, including the federally-regulated disposal of

thousands of tires. In addition, the contractor is responsible for following all federally mandated regulations and guidelines and maintaining all required licenses. To inspect, service and maintain the supplied wheel balancers in adherence with the manufactures recommendations to assure proper performance throughout the usable life.

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

SFMTA's revenue fleet requires between six to ten tires per vehicle, not including spares. SFMTA is not able to provide a large-scale tire program with specialized equipment in-house. It is common practice for transit agencies to lease tires rather than purchase them and to contract out all support services. This program also includes 24-hour/7 days-a-week emergency towing of large-scale vehicles. Denial of this contract would severely impact, if not ground SFMTA's rubber-tire revenue fleet.

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

No

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:

To include the service and maintenance of MTA owned tire balancer

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 city lacks the scale of resources to facilitate the servicing of the tires on a revenue fleet the size that the SFMTA operates.

B. Reason for the request for modification:

To add service and maintenance to SFMTA-owned tire balancer.

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

A. Specify required skills and/or expertise: To conduct a successful in-house tire program, skills and expertise are required in the following are manufacturing, purchasing, installation, mounting and dismounting of tires. Department of Transportation (DOT) and Department of the Environment (DOE) regulations, tire tracking expertise, including original equipment manufacturer initiated product recalls and all related tracking and assistance providing emergency road-side service on a 24-hour/7 days-a-week basis, knowledge of hazardous materials acquisition and licensing requirements, etc.

B. Which, if any, civil service class(es) normally perform(s) this work? 7381, Automotive Mechanic; 7382, Automotive Mechanic Asst Sprv; 7410, Automotive Service Worker; 7412, Auto

Svc Wrk Asst Sprv;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide air tools and all tire components required to mount, dismount, support and maintain large scale rubber tires and all other necessary materials and equipment, including customized, lift-gate-equipped, emergency road-side service response/tow trucks.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
Civil service classes perform some of these services, but not at the level of capacity for large-scale tires and provide services at that capacity.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Civil service classifications already exist. Due to the impracticality of bringing a large scale tire program in-house, it is standard practice in the industry to lease tires and to outsource all related activities to the tire supplier

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Training to service and maintain wheel balancer to be done by contractor. There will be no training required to employees, contractor will train staff once contract is awarded.
- 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, Michelin North America, Contract # 1000012572

7. **Union Notification:** On 04/12/22, the Department notified the following employee organizations of this PSC/RFP request:
Transport Workers Union, L 200; TWU - Automotive Service Worker; Prof & Tech Eng, Local 21; Automotive Machinists, Local 1414;

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

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

Address: 1 S Van Ness Ave, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49631 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Tuesday, April 12, 2022 10:38 AM
To: Nuque, Amy; local200twu; mdennis@twusf.org; roger marenco; Pete Wilson - Union 250A VP; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; Mjayne@iam1414.org; agonzalez@iam1414.org; speedy4864@aol.com; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 49631 - 20/21 - MODIFICATIONS

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 MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a modification request for a Personal Services Contract (PSC) for \$100,000 for services for the period May 1, 2022 – April 30, 2027. 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/18134>

Email sent to the following addresses: speedy4864@aol.com agonzalez@iam1414.org Mjayne@iam1414.org L21PSCReview@ifpte21.org amakayan@ifpte21.org pkim@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com pwilson@twusf.org rmarenco@twusf.org mdennis@twusf.org local200twu@sbcglobal.net

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTADept. Code: MTAType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: TIRE LEASE AND ASSOCIATED SERVICESFunding Source: Operating FundsPSC Duration: 3 yearsPSC Amount: \$9,800,000**1. Description of Work**

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

The contractor will lease, service and dispose of all tires used by the San Francisco Municipal Transit Agency (SFMTA) on all rubber-tire revenue vehicles. The SFMTA's rubber tire revenue fleet comprised of buses and trolleys that transport the public: diesel, hybrid buses and electric trolleys. The contractor, the will be responsible for; manufacturing, procuring and transporting a sufficient supply of tires as required to guarantee continuity of service; mounting and dismounting tires on and from the rim, balancing tires, changing wheels/rims maintaining proper tire pressure; recapping rear tires, providing emergency road-side service 24 hour / 7 days-a-week; conducting monthly maintenance checks on all tires providing required tools and equipment not furnished by SFMTA; and performing in-depth tracking of the tires through all stages, including the federally-regulated disposal of thousands of tires. In addition, the contractor is responsible for following all federally mandated regulations and guidelines and maintaining all required licenses.

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

SFMTA's revenue fleet requires between six to ten tires per vehicle, not including spares. SFMTA is not able to provide a large-scale tire program with specialized equipment in-house. It is common practice for transit agencies to lease tires rather than purchase them and to contract out all support services. This program also includes 24-hour/7 days-a-week emergency towing of large-scale vehicles. Denial of this contract would severely impact, if not ground SFMTA's rubber-tire revenue fleet.

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 service has been provided is the pass under previously PSC # 42421 17/18 (approved 8/6/2018)

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):

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

B. Explain the qualifying circumstances:

The city lacks the scale of resources to facilitate the servicing of the tires on a revenue fleet the size that the SFMTA operates.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: To conduct a successful in-house tire program, skills and expertise are

required in the following are manufacturing, purchasing, installation, mounting and dismounting of tires. Department of Transportation (DOT) and Department of the Environment(DOE) regulations, tire tracking expertise, including original equipment manufacturer initiated product recalls and all related tracking and assistance providing emergency road-side service on a 24-hour/7 days-a-week basis, knowledge of hazardous materials acquisition and licensing requirements, etc.

- B. Which, if any, civil service class(es) normally perform(s) this work? 7381, Automotive Mechanic; 7382, Automotive Mechanic Asst Sprv; 7410, Automotive Service Worker; 7412, Auto Svc Wrk Asst Sprv;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide air tools and all tire components required to mount, dismount, support and maintain large scale rubber tires and all other necessary materials and equipment, including customized, lift-gate-equipped, emergency road-side service response/tow trucks.

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

There are no resources within the city to facilitate managing a tire servicing program on the scale required.

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

- A. Explain why civil service classes are not applicable.
Civil service classes perform some of these services, but not at the level of capacity for large-scale tires and provide services at that capacity.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Civil service classifications already exist. Due to the impracticality of bringing a large scale tire program in-house, it is standard practice in the industry to lease tires and to outsource all related activities to the tire supplier

6. Additional Information

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

7. Union Notification: On 07/21/2020, the Department notified the following employee organizations of this PSC/RFP request:

Automotive Machinists, Local 1414; Prof & Tech Eng, Local 21; TWU - Automotive Service Worker; Transport Workers Union, L 200

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 S Van Ness Ave San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49631 - 20/21

DHR Analysis/Recommendation:

action date: 10/19/2020

Commission Approval Required

Approved by Civil Service Commission

10/19/2020 DHR Approved for 10/19/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 3094 - 12/13)

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

Type of Service: As needed consulting/training for Medi-cal Administrative Activities (MAA) and Targeted case m

Funding Source: General Fund

PSC Original Approved Amount: \$20,000

PSC Original Approved Duration: 07/01/13 - 12/31/18 (5 years 26 weeks)

PSC Mod#1 Amount: \$10,000

PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$95,000

PSC Mod#2 Duration: 03/01/18-02/28/21 (2 years 8 weeks)

PSC Mod#3 Amount: \$1,200,000

PSC Mod#3 Duration: 01/01/21-12/31/25 (4 years 43 weeks)

PSC Mod#4 Amount: \$2,500,000

PSC Mod#4 Duration: 07/01/22-12/31/30 (5 years 1 day)

PSC Cumulative Amount Proposed: \$3,825,000

PSC Cumulative Duration Proposed: 17 years 26 weeks

1. Description of Work

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

The Contractor will provide as needed expert consultation and training on the very complex issues and procedures related to the City and DPH receiving reimbursement for services provided to patients/clients receiving services paid for by Federal monies administered through the State-medical Administrative Activities (MAA) and Targeted case Management (TCM) Programs. These programs allow DPH to receive approximately \$10 million dollars in revenue annually. This consultation consists of advising on validating staff time survey documentation, new issues anticipated from the programs transition to electronic claims submissions, and the expanded need and potential revenue possible with the advent of health care reform.

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

Cursory review of these programs shows the potential to increase claims significantly if they are submitted to the State in conformance with the States extremely detailed and very complex requirements. Otherwise, instructions on how to meet these requirements is only with the States outdated and very basic State manual which since its last publication has been amended by more than 50 complex policies. Access to this consultant will enable DPH to submit better claims, resulting in expected increases in revenues as well as avoiding costly paybacks due to disallowed claims and knowledge transfer to the incumbent Civil Service employee.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
yes
- D. Will the contract(s) be renewed?
If there is a 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:
The duration of the services will be in excess of five years as long as the City participates in the MAA-TCM program.

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:

Training less than 20 hours per year on an as needed basis for State Manual and reporting understanding of the MAa/TCM Program

B. Reason for the request for modification:

This Modification #4 increases the amount in order to continue services with the County of Santa Cruz in support of the County-based Medi-Cal Administrative Activities (CMAA) and Targeted Case Management (TCM) program and extends the term of the requested approval.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Sufficient significant and broad experience in the MAA and TCM programs within California at the County level and Nationally to add value to the work of the current Civil Service Staff and to transfer knowledge to staff to reduce the need for consultants in the future.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
The need for these services is intermittent and as-needed and very low volume.
- 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. There is not sufficient

enough work to justify one FTE. The primary purpose of the contract is to augment the expertise of existing staff and provide knowledge transfer to existing staff.

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.
20 hours per year on State Manual. 1823 Senior Admin Analysts.

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

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

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

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

7. Union Notification: On 04/12/22, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

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

Address: Jacquie.Hale@sfdph.org, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3094 - 12/13

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 05/16/2022

Civil Service Commission Action:

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 3094 - 12/13 - MODIFICATIONS

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

on behalf of

kelly.hiramoto@sfdph.org <kelly.hiramoto@sfdph.org>

Tue 4/12/2022 3:58 PM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.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>; pkim@ifpte21.org <pkim@ifpte21.org>; L21PSCReview@ifpte21.org <L21PSCReview@ifpte21.org>; kelly.rojas@sfdph.org <kelly.rojas@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$2,500,000 for services for the period July 1, 2022

– December 31, 2030. 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/6685>

Email sent to the following addresses: L21PSCReview@ifpte21.org
pkim@ifpte21.org
eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org
tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com
ecassidy@ifpte21.com

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 3094 - 12/13)

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

Type of Service: As needed consulting/training for Medi-cal Administrative Activities (MAA) and Targeted case m

Funding Source: General Fund

PSC Original Approved Amount: \$20,000 PSC Original Approved Duration: 07/01/13 - 12/31/18 (5 years 26 weeks)

PSC Mod#1 Amount: \$10,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: \$95,000 PSC Mod#2 Duration: 03/01/18-02/28/21 (2 years 8 weeks)

PSC Mod#3 Amount: \$1,200,000 PSC Mod#3 Duration: 01/01/21-12/31/25 (4 years 43 weeks)

PSC Cumulative Amount Proposed: \$1,325,000 PSC Cumulative Duration Proposed: 12 years 26 weeks

1. Description of Work

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

The Contractor will provide as needed expert consultation and training on the very complex issues and procedures related to the City and DPH receiving reimbursement for services provided to patients/clients receiving services paid for by Federal monies administered through the State- medical Administrative Activities (MAA) and Targeted case Management (TCM) Programs. These programs allow DPH to receive approximately \$10 million dollars in revenue annually. This consultation consists of advising on validating staff time survey documentation, new issues anticipated from the programs transition to electronic claims submissions, and the expanded need and potential revenue possible with the advent of health care reform.

Scope Change

Modification #3 adds the services of the Host County of the consortium of Local Government Agencies (LGAs) which coordinates and administers the federal Medi-Cal Administrative Activities (CMAA) and Targeted Case Management (TCM) programs in California. These services include administration of tasks such as collection and disbursement of participation fees, maintenance of the CMAA/TCM trust fund, paying the State for administration and other costs, and engaging a CMAA/TCM consultant to support CMAA/TCM administration, coordinate with the State, and serve as liaison between the LGAs and the State on policy issues.

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

Cursory review of these programs shows the potential to increase claims significantly if they are submitted to the State in conformance with the States extremely detailed and very complex requirements. Otherwise, instructions on how to meet these requirements is only with the States outdated and very basic State manual which since its last publication has been amended by more than 50 complex policies. Access to this consultant will enable DPH to submit better claims, resulting in expected increases in revenues as well as avoiding costly paybacks due to disallowed claims and knowledge transfer to the incumbent Civil Service employee.

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 3094 - 12/13

D. Will the contract(s) be renewed?

If there is a 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:

The duration of the services will be in excess of five years as long as the City participates in the MAA-TCM program.

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:

Training less than 20 hours per year on an as needed basis for State Manual and reporting understanding of the MAa/TCM Program

B. Reason for the request for modification:

This Modification #3 increases the amount in order to establish a formal contract with the County of Santa Cruz, the Host County of the consortium of Local Government Agencies (LGAs) which coordinates and administers the federal Medi-Cal Administrative Activities (CMAA) and Targeted Case Management (TCM) programs in California. This formal contract replaces the previous arrangement, whereby San Francisco contracted with the State and paid the Host County directly without a contract. On behalf of the City and County of San Francisco, the Department of Public Health participates in a federal reimbursement program which aims to promote access to health services to residents through the provision of County-based Medi-Cal Administrative Activities (CMAA) and Targeted Case Management (TCM). Under this program, the Centers for Medicare & Medicaid Services (CMS) reimburses counties for a portion of the expense of administering the Medi-Cal program and providing Targeted Case Management for Medi-Cal- covered services. This results in nearly \$15 million in revenue annually. In California, the program is administered by the State Department of Health Care Services (DHCS) through a consortium of participating LGAs. The consortium selects a Host County to administer tasks such as collection and disbursement of participation fees, maintenance of the CMAA/TCM trust fund, paying the State for administration and other costs, and engaging a CMAA/TCM consultant to support CMAA/TCM administration, coordinate with the State, and serve as liaison between the LGAs and the State on policy issues. The current Host County is the County of Santa Cruz. In the past, SFDPH has executed separate agreements with DHCS to participate in the CMAA/TCM program, and handled payments to the Host County through direct payments. With the selection of the County of Santa Cruz as Host County, a formal contract between San Francisco and Santa Cruz is now required in order to comply with Santa Cruz's contracting requirements. (Note: The amount reflects the program's billing practices, wherein the Host County fee is for billed in the current year for claims adjudicated in prior years.)

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Sufficient significant and broad experience in the MAA and TCM programs within California at the County level and Nationally to add value to the work of the current Civil Service Staff and to transfer knowledge to staff to reduce the need for consultants in the future.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
The need for these services is intermittent and as-needed and very low volume.
- 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. There is not sufficient enough work to justify one FTE. The primary purpose of the contract is to augment the expertise of existing staff and provide knowledge transfer to existing staff.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
There is no training of civil service employees under this contract.
- C. Are there legal mandates requiring the use of contractual services?
No.

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

7. **Union Notification:** On 01/20/21, 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: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: Jacquie.Hale@sfdph.org, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3094 - 12/13

DHR Analysis/Recommendation:

03/01/2021

Commission Approval Required

Approved by Civil Service Commission

03/01/2021 DHR Approved for 03/01/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 42960 - 18/19)

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

Type of Service: Solid Waste Collection Services(CT 6188)

Funding Source: HHWP Operating Budget

PSC Original Approved Amount: \$225,000

PSC Original Approved Duration: 07/01/19 - 06/30/22 (3 years)

PSC Mod#1 Amount: \$150,000

PSC Mod#1 Duration: 06/30/22-09/30/23 (1 year 13 weeks)

PSC Cumulative Amount Proposed: \$375,000

PSC Cumulative Duration Proposed: 4 years 13 weeks

1. Description of Work

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

Weekly Garbage and solid waste collections at Hetch Hetchy Water & Power, located in Area 4 of Tuolumne County. Moore Brothers is the sole vendor for solid waste collection and transportation in the Moccasin Area.

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

Regular trash pickups are necessary because of public health concerns. Accumulated trash creates a health hazard.

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 42960 - 18/19

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:

N/A

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:

Garbage / Trash services are required for public health reasons and preclude any Civil Service Employees from performing this task.

B. Reason for the request for modification:

To mirror the existing contract between the consultant and Tuolumne County.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A franchise agreement must be in place to pick up solid waste in Tuolumne County.

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. Trash bins of various sizes will be supplied by contractor, along with dump trucks to haul material.

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.

Must possess a franchise agreement with the county to perform this service. Civil service staff cannot do this.

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.

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 not train employees. This is a garbage service contract and the contractor only, will perform this work.

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

Contractor has a franchise agreement in place with Tuolumne County currently, and no other vendor may be used.

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 04/14/22, 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 Avenue, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42960 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DEM\)](mailto:Emanuel,Rachel.(DEM)); laborers261@gmail.com; [Laxamana, Junko \(BOS\)](mailto:Laxamana,Junko.(BOS)); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; Samaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sfflocal798.org; cityworker@sfwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 42960 - 18/19 - MODIFICATIONS
Date: Thursday, April 14, 2022 1:02:31 PM

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 \$150,000 for services for the period June 30, 2022 – September 30, 2023. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/18317>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUCDept. Code: PUCType of Request: Initial Modification of an existing PSC (PSC # _____)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Solid Waste Collection Services(CT 6188)Funding Source: HHWP Operating BudgetPSC Amount: \$225,000PSC Est. Start Date: 07/01/2019PSC Est. End Date 06/30/2022**1. Description of Work**

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

Weekly Garbage and solid waste collections at Hetch Hetchy Water & Power, located in Area 4 of Tuolumne County. Moore Brothers is the sole vendor for solid waste collection and transportation in the Moccasin Area.

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

Regular trash pickups are necessary because of public health concerns. Accumulated trash creates a health hazard.

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. Moore Brothers has been providing this service to HHWP since the beginning of the franchise agreement with Tuolumne County (March 28, 1995.)

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.

N/A

2. Reason(s) for the Request

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

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:

Garbage / Trash services are required for public health reasons and preclude any Civil Service Employees from performing this task.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: A franchise agreement must be in place to pick up solid waste in Tuolumne County.

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. Trash bins of various sizes will be supplied by contractor, along with dump trucks to haul material.

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

None. Not applicable.

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

A. Explain why civil service classes are not applicable.

Must possess a franchise agreement with the county to perform this service. Civil service staff cannot do this.

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.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. The contractor will not train employees. This is a garbage service contract and the contractor only, will perform this work.

C. Are there legal mandates requiring the use of contractual services?
Yes. Contractor has a franchise agreement in place with Tuolumne County currently, and no other vendor may be used.

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 05/02/2019, 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: Bill Irwin Phone: 415-934-3975 Email: wirwin@sfgwater.org

Address: 525 Golden Gate Avenue San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42960 - 18/19

DHR Analysis/Recommendation:

action date: 07/15/2019

Commission Approval Required

Approved by Civil Service Commission

07/15/2019 DHR Approved for 07/15/2019

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request: Initial Modification of an existing PSC (PSC # 46598 - 17/18)

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

Type of Service: Property Tax System Replacement Professional Services

Funding Source: General Fund

PSC Original Approved Amount: \$20,000,000 PSC Original Approved Duration: 11/15/18 - 11/15/22 (4 years 1 day)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 04/06/22-11/14/28 (6 years 1 day)

PSC Cumulative Amount Proposed: \$20,000,000 PSC Cumulative Duration Proposed: 10 years 2 days

1. Description of Work

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

The Offices of The Treasurer & Tax Collector (TTX) and the Controller's Office (CON) are seeking a vendor to provide design, development/configuration, installation, and implementation services to replace their legacy Property Tax Systems with a modern software solution. This is a multi-year project that that has been planned alongside and will be implemented in parallel with the Office of the Assessor-Recorder (ASR) project to replace their legacy property assessment system. Upon completion of implementation, training and knowledge transfer will be provided to City staff who will provide support services for the system.

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

The current system used by the Office of the Treasurer and Tax Collector (TTX) and the Controller (CON) is responsible for managing billing, collections and apportionment of \$2.5B in property taxes annually. The City is facing issues with its current property tax technical environment which has led to the need for a new system. The Mainframe is a legacy system that the City is attempting to phase out through various departmental replacement activities. As departments leave the shared Mainframe environment, the burden of funding will continue to increase on the remaining departments. Although the City is currently able to support its custom coded COBOL application, full, knowledgeable support will likely not continue past the near term. Technical skills to support the existing mainframe technology and develop programs in the COBOL programming language are becoming increasingly rare and there is a risk that the City will lose the ability to support its' current systems in a cost effective and quality manner. As state and local laws continue to evolve, it is becoming increasingly difficult for the current systems to adapt. New systems have been designed to operate around current laws and regulations and allow for the flexibility for future adaptations which would require significant work arounds using our current systems. A replacement system would ensure the continued ability for the City to collect nearly 30% of the general fund in an efficient manner and solidify the ability to support the system for years to come. Anticipated Outcomes: 1. Efficient Taxation: Facilitate the efficient and effective determination, collection, appropriation and distribution of property taxes 2. Revenue Forecasting: Facilitate view and use of historical statistics and current pending items to

accurately forecast future revenue through timely access to high quality data and comprehensive reporting capabilities 3. Quality and Transparent Data: Facilitate data capture and review in an easy and logical manner, including efficient interfacing and automatic system checking for correctness and completeness before acceptance by authorized users into the system's data records; provide visibility into the underlying business calculations 4. Secure and Integrated Access: Provide authorized users with an integrated access to all modules, data, and services relevant to the user group; Allow system administrators to restrict data access and transaction execution based on user role 5. Configurable Business Rules: Provide a highly configurable and adaptable system that can adjust to specific and changing needs and is easy for business users to use and change 6. Scalable and Extensible: Provide a scalable system able to accommodate additional users and expanding capabilities to meet future business needs and local and State mandates

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 46598 - 17/18

D. Will the contract(s) be renewed?

Maintenance and operational support may be renewed for parts of ongoing support, to compliment the City's IT support infrastructure

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 Office of the Treasurer and Tax Collector requires additional time to fully utilize remaining professional services hours for as needed software upgrades and modifications.

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:

This is a short-term, highly specialized service requiring expertise with property tax software development and implementations. Civil service classes will obtain knowledge transfer prior to implementation which will allow them to manage the system once in production, and be able to perform all on-going future upgrades.

B. Reason for the request for modification:

Add time

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Providing Property Tax System design, implementation and configuration services and employee training/knowledge transfer requires expert functional and technical knowledge of the Property Tax System and its components, the ability to provide functional and design specification writing, and extensive prior experience with teaching users how to work with the product.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1043, IS Engineer-Senior; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1062, IS Programmer Analyst; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 1825, Prnpl Admin Analyst II;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: New facilities and/or equipment not currently owned by the City will depend on the solution chosen. These items may include equipment and servers to support a hosted solution or may only include software and licensing.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This is a short-term, highly specialized service requiring expertise with implementing a new property tax system not yet in widespread use. Civil service classes will manage the system once in production, and will perform all on-going future upgrades.
- 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, due to the term of the work and the very specialized nature of property tax systems, it is not practical to do so.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. The training plan and number of hours will depend on the vendor and system that is selected. A Training Strategy and Training Plan will both be deliverables on the project to customize training for the City's project team. There will also be a knowledge transfer component as City employees will take over management of the system following implementation. The following employees will be receiving training: 0942 Manager VII, 0933 Manager V, 1070 IS Project Director, 106x series IS Programmer Analysts, 105x series IS Business Analysts, 182x series Administrative Analysts. Training to configure and maintain the system going forward. The number of staff to be trained will be dependent on the size of the City's project team. The contractor will develop manuals based on specific property tax scenarios and train existing City employees on the use of the new system.
- 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.

PSC 46598 - 17/18

7. Union Notification: On 04/06/22, 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. Carllton B. Goodlett Place, Room 140, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46598 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/16/2022

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of amanda.wentworth@sfgov.org
To: [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; L21PSCReview@ifpte21.org; [DHR-
PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Modification Request to PSC # 46598 - 17/18 - MODIFICATIONS
Date: Wednesday, April 6, 2022 2:40:22 PM

PSC RECEIPT of Modification notification sent to Unions and DHR

The TREASURER/TAX COLLECTOR -- TTX has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period April 6, 2022 – November 14, 2028. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/18155>

Email sent to the following addresses: L21PSCReview@ifpte21.org
amakayan@ifpte21.org pkim@ifpte21.org kschumacher@ifpte21.org
tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com

Additional Attachment(s)

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: Property Tax System Replacement Professional Services

Funding Source: General Fund

PSC Duration: 4 years 1 day

PSC Amount: \$20,000,000

1. Description of Work

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

The Offices of The Treasurer & Tax Collector (TTX) and the Controller's Office (CON) are seeking a vendor to provide design, development/configuration, installation, and implementation services to replace their legacy Property Tax Systems with a modern software solution. This is a multi-year project that has been planned alongside and will be implemented in parallel with the Office of the Assessor-Recorder (ASR) project to replace their legacy property assessment system. Upon completion of implementation, training and knowledge transfer will be provided to City staff who will provide support services for the system.

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

The current system used by the Office of the Treasurer and Tax Collector (TTX) and the Controller (CON) is responsible for managing billing, collections and apportionment of \$2.5B in property taxes annually. The City is facing issues with its current property tax technical environment which has led to the need for a new system. The Mainframe is a legacy system that the City is attempting to phase out through various departmental replacement activities. As departments leave the shared Mainframe environment, the burden of funding will continue to increase on the remaining departments. Although the City is currently able to support its custom coded COBOL application, full, knowledgeable support will likely not continue past the near term. Technical skills to support the existing mainframe technology and develop programs in the COBOL programming language are becoming increasingly rare and there is a risk that the City will lose the ability to support its' current systems in a cost effective and quality manner. As state and local laws continue to evolve, it is becoming increasingly difficult for the current systems to adapt. New systems have been designed to operate around current laws and regulations and allow for the flexibility for future adaptations which would require significant work arounds using our current systems. A replacement system would ensure the continued ability for the City to collect nearly 30% of the general fund in an efficient manner and solidify the ability to support the system for years to come. Anticipated Outcomes: 1. Efficient Taxation: Facilitate the efficient and effective determination, collection, appropriation and distribution of property taxes 2. Revenue Forecasting: Facilitate view and use of historical statistics and current pending items to accurately forecast future revenue through timely access to high quality data and comprehensive reporting capabilities 3. Quality and Transparent Data: Facilitate data capture and review in an easy and logical manner, including efficient interfacing and automatic system checking for correctness and completeness before acceptance by authorized users into the system's data records; provide visibility into the underlying business calculations 4. Secure and Integrated Access: Provide authorized users with an integrated access to all modules,

data, and services relevant to the user group; Allow system administrators to restrict data access and transaction execution based on user role 5. Configurable Business Rules: Provide a highly configurable and adaptable system that can adjust to specific and changing needs and is easy for business users to use and change 6. Scalable and Extensible: Provide a scalable system able to accommodate additional users and expanding capabilities to meet future business needs and local and State mandates

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 service has not been provided in the past.

D. Will the contract(s) be renewed?

Maintenance and operational support may be renewed for parts of ongoing support, to compliment the City's IT support infrastructure

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:

This is a short-term, highly specialized service requiring expertise with property tax software development and implementations. Civil service classes will obtain knowledge transfer prior to implementation which will allow them to manage the system once in production, and be able to perform all on-going future upgrades.

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

A. Specify required skills and/or expertise: Providing Property Tax System design, implementation and configuration services and employee training/knowledge transfer requires expert functional and technical knowledge of the Property Tax System and its components, the ability to provide functional and design specification writing, and extensive prior experience with teaching users how to work with the product.

B. Which, if any, civil service class(es) normally perform(s) this work? 1043, IS Engineer-Senior; 1052, IS Business Analyst; 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1062, IS Programmer Analyst; 1063, IS Programmer Analyst-Senior; 1064, IS Prg Analyst-Principal; 1825, Prnpl Admin Analyst II;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: New facilities and/or equipment not currently owned by the City will depend on the solution chosen. These items may include equipment and servers to support a hosted solution or may only include software and licensing.

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

This is a highly specialized project and requires expertise with Property Tax software development. During the system implementation, the City's project team will be paired with consultants to design and develop the system with the intent of City staff supporting the system upon project completion.

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

A. Explain why civil service classes are not applicable.

This is a short-term, highly specialized service requiring expertise with implementing a new property tax system not yet in widespread use. Civil service classes will manage the system once in production, and will perform all on-going future upgrades.

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, due to the term of the work and the very specialized nature of property tax systems, it is not practical to do so.

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. Yes. The training plan and number of hours will depend on the vendor and system that is selected. A Training Strategy and Training Plan will both be deliverables on the project to customize training for the City's project team. There will also be a knowledge transfer component as City employees will take over management of the system following implementation. The following employees will be receiving training: 0942 Manager VII, 0933 Manager V, 1070 IS Project Director, 106x series IS Programmer Analysts, 105x series IS Business Analysts, 182x series Administrative Analysts. Training to configure and maintain the system going forward. The number of staff to be trained will be dependent on the size of the City's project team. The contractor will develop manuals based on specific property tax scenarios and train existing City employees on the use of the new system.

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 11/02/2017, 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: Kimmie Wu Phone: 415-554-4513 Email: Kimmie.wu@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46598 - 17/18

DHR Analysis/Recommendation:

action date: 01/22/2018

Commission Approval Required

Approved by Civil Service Commission

01/22/2018 DHR Approved for 01/22/2018