

CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

Sent via Electronic Mail

E. DENNIS NORMANDY
PRESIDENT

DOUGLAS S. CHAN
VICE PRESIDENT

KATE FAVETTI
COMMISSIONER

SCOTT R. HELDFOND
COMMISSIONER

GINA M. ROCCANOVA
COMMISSIONER

SANDRA ENG
ACTING EXECUTIVE OFFICER

December 4, 2014

NOTICE OF CIVIL SERVICE COMMISSION MEETING

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS NUMBERS 43672-14/15; 44959-14/15; 45026-14/15; 41436-14/15; 44337-14/15; 43826-14/15; 47260-14/15; 40297-14/15; 44508-14/15; 4059-13/14; 4072-07/08; AND 4054-10/11.

The above matter will be considered by the Civil Service Commission at a meeting to be held on **December 15, 2014** at 2:00 p.m. in Room 400, Fourth Floor, City Hall, 1 Dr. Carlton B. Goodlett Place.

This item will appear on the Ratification Agenda. Please refer to the attached Notice for procedural and other information about Commission hearings.

Attendance by you or an authorized representative is welcome. Should you or your representative not attend, the Commission will rule on the information previously submitted and testimony provided at its meeting. All calendared items will be heard and resolved at this time unless good reasons are presented for a continuance.

All non-privileged materials being considered by the Civil Service Commission for this item are available for public inspection and copying at the Civil Service Commission office Monday through Friday from 8:00 a.m. to 5:00 p.m.

CIVIL SERVICE COMMISSION

SANDRA ENG
Acting Executive Officer

Attachment

- Cc: Cynthia Avakian, Airport Commission
 Parveen Boparai, Municipal Transportation Agency
 Micki Callahan, Department of Human Resources
 Jolie Gines, Department of Technology
 Jacquie Hale, Department of Public Health
 Cynthia Hamada, Municipal Transportation Agency
 Shamica Jackson, Public Utilities Commission
 William Lee, Emergency Communications Department
 Stacey Lo, Public Utilities Commission
 Sean McFadden, Recreation and Parks Department
 Genie Wong, Police Department
 Commission File
 Commissioners' Binder
 Chron

**THIS DOCUMENT SUPPORTS
CALENDAR ITEM** 7

City and County of San Francisco



Department of Human Resources

Edwin M. Lee
Mayor

Micki Callahan
Human Resources Director

Date: November 26, 2014
To: The Honorable Civil Service Commission
Through: Micki Callahan
Human Resources Director
From: Cynthia Avakian, AIR
William Lee, ECD
Parveen Boparai/Cynthia Hamada, MTA
Genie Wong, POL
Sean McFadden, REC
Jolie Gines, TIS
Jacquie Hale, DPH
Shamica Jackson/Stacey Lo, PUC

Subject: **Personal Services Contracts Approval Request**

This report contains twelve (12) personal services contracts (PSCs) in accordance with the revised Civil Service Commission (CSC) procedures for processing PSCs that became effective on October 25, 2013.

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

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

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

Total of this Report	YTD Expedited Approvals FY2014-2015	Total for FY2014-2015
\$242,021,900	\$28,436,838	\$747,275,043

Cynthia Avakian
Airport Commission
Contracts Administration Unit
POB 8097
San Francisco, CA 94128
650- 821-2014

William Lee
Department of Emergency Management
1011 Turk Street
San Francisco, CA 94102
415-558-3866

Parveen Boparai
Cynthia Hamada
Municipal Transportation Agency
1 South Van Ness Ave., 6th Floor
San Francisco, CA 94103
415-701-5381

Genie Wong
Police
850 Bryant Street, #511
San Francisco, CA 94103
415-553-1736

Sean McFadden
Recreation and Park Commission
501 Stanyan Street
San Francisco, Ca 94117
415-831-2779

Jolie Gines
Technology
1 South Van Ness Ave., 2nd Floor
San Francisco, CA 94103
415-581-3974

Jacquie Hale
Public Health
101 Grove Street Rom 307
San Francisco, CA 94102
415-554-2609

Shamica Jackson
Stacey Lo
Public Utilities Commission
525 Golden Gate Ave., 8th Floor
San Francisco, CA 94102
SJ: (415) 554-0727
SL: (415) 554-1860

Table of Contents
PSC Submissions

Regular PSCs	Department	Page
43672-14/15	Airport Commission	1
44959-14/15	Airport Commission	21
45026-14/15	Airport Commission	25
41436-14/15	Department of Emergency Management	50
44337-14/15	Department of Emergency Management	60
43826-14/15	Municipal Transportation Agency	79
47260-14/15	Police	100
40297-14/15	Recreation and Park Commission	134
44508-14/15	Technology	140
Modification PSCs		
4059-13/14	Public Health	169
4054-10/11	Police	194
4072-07/08	Public Utilities Commission	264

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

Home >

POSTING FOR

December 15, 2014

PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR**Commission Hearing Date**

2014-12-15

APPLY

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date
43672 - 14/15	AIRPORT COMMISSION	\$1,000,000.00	To provide San Francisco International Airport (SFO) with general investment advisory services on an as-needed basis. This includes review of the investment policy and best practice recommendations for \$680 million of debt service reserve funds; advisory service on portfolio structure, security selection and periodic re-balancing of the portfolio; and preparation of detailed holding, activity or market condition reports on a daily, monthly or quarterly basis.	December 15, 2014	June 30, 2020
44959 - 14/15	AIRPORT COMMISSION	\$200,000,000.00	Project Management Support Services (PMSS) and Design Build (DB) service teams with hotel and transportation experience are required to manage the design and construction of the Airport Hotel Program. Services to be provided include project controls, scheduling, document control, design management, contract management, and architectural and engineering design services. The Airport Hotel Program encompasses three separate projects which require planning and coordination which are: the Airport Hotel, Air Train Station, and the Roadway Realignment project. The Airport Hotel and Air Train Station will require PMSS and DB services. The Roadway Realignment Project will require PMSS services only and will be overseen by Airport Civil Engineering staff. The Roadway Realignment project will relocate South McDonnell Road, relocate underground utilities, and create a new road leading to the Airport hotel.	January 1, 2015	June 30, 2019
45026 - 14/15	AIRPORT COMMISSION	\$1,000,000.00	Provide customer survey data regarding the quality of the San Francisco International Airport's (SFO) Food and Beverage and Retail Services, Parking, and other facilities and services, using the global survey product and methodology associated with the Airport Service Quality (ASQ) Program. ASQ is the only airport survey and services benchmarking program with global reach. The ASQ Program will include conducting 5,600 annual (1400 quarterly) on-site customer interviews. Contractor will use the ASQ Program to produce, execute, and analyze the data, producing results and recommendations to SFO.	January 1, 2015	June 30, 2021
41436 - 14/15	DEPARTMENT OF EMERGENCY MANAGEMENT	\$250,000.00	The selected vendor will perform required psychological evaluations and provide written summary and assessment reports for all selected candidates as part of their final selection process for hiring positions in the Department of Emergency Management's Division of Emergency Communications (DEC).	January 1, 2015	June 30, 2020
44337 - 14/15	DEPARTMENT OF EMERGENCY MANAGEMENT	\$200,000.00	Contractor will provide web design services to support the execution of an upgraded website to better promote the Urban Areas Security Initiative (UASI) program and its regional projects. The enhanced website will be easy to navigate, provide for a grants management system for partner jurisdictions to perform fiscal grants management activities, and have enough capacity to allow for the addition of audio/video presentations, webinars, and other multi-media needs.	January 15, 2015	December 31, 2017
43826 - 14/15	MUNICIPAL TRANSPORTATION AGENCY	\$2,000,000.00	The contractor(s) will provide financial planning, debt management, financial analysis and other financial services on an as-needed basis including, but not limited to, the following: <ul style="list-style-type: none"> •Review and update the SFMTA's financial plan for future financing transactions after a thorough review and analyses of the existing financial resources, cash flows, bond indebtedness and legal structure of the SFMTA. •Provide as-needed financial advice regarding market conditions and trends, 	January 13, 2015	January 13, 2020

PSC No	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date
			<p>financial products, credit and credit analysis, third party alternative financing and special facility financing.</p> <ul style="list-style-type: none"> •Review and evaluate financing options, financial feasibility studies, legal documents, and structure and pricing of any financing and any escrow. •Participate in credit rating agency presentations and preparation of official statements. •Assist with the selection of underwriters, escrow agent, verification agent, trustee and any other members required for a financing team. •Participate in preparing or providing financial analyses for projects and for the preparation of grant proposals. 		
47260 - 14/15	POLICE	\$600,000.00	The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.	July 1, 2015	June 30, 2019
40297 - 14/15	RECREATION AND PARK COMMISSION	\$500,000.00	The Priority Conservation Area (PCA) Grant will fund park planning for 900 Innes, a property recently acquired by the City, which is adjacent to India Basin Shoreline Park and India Basin Shoreline Open Space. 900 Innes consists of 3 acres, 1.9 of which are on land. Innes Avenue and neighboring areas have been included for planning purposes in the Bayview Hunters Point Area Plan and the India Basin Shoreline SubArea Plan, in addition to the San Francisco Bay Trail Plan and the Port of San Francisco's 13-mile Blue Greenway Plan. On this site, the Recreation and Park Department (RPD) plans to develop a new full service park for the community, providing residents local access to open space and parkland resources as well as new recreational opportunities. RPD will contract with a consultant to do the following: public outreach to the community and stakeholders; site analysis and preparation of environmental studies and documents for compliance with the California Environmental Quality Act (CEQA); and a conceptual park plan with cost estimates and strategies for the implementation future park improvements.	January 1, 2015	January 1, 2019
44508 - 14/15	GENERAL SERVICES AGENCY - TECHNOLOGY	\$2,800,000.00	The primary objective of this project is to implement a citywide Web Content Management (WCM) solution that is sufficiently scalable to address the growing needs of the City's websites while offering the flexibility required to satisfy City departments' unique needs. The project envisions the vendor working with City staff to setup and support the WCM cloud environment that will enable the City to build custom websites using a more sophisticated software development system, the Drupal system. This more sophisticated and flexible solution will replace the City's current low-cost solution offered by our incumbent Web content management vendor, Vision Internet, a vendor procured through the Technology Store.	July 1, 2015	June 30, 2019

TOTAL AMOUNT \$208,350,000

437

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

Home >

Posting For December 15, 2014**Proposed Modifications to Personal Services Contracts****Commission Hearing Date**

2014-12-15

APPLY

PSC Number	Commission Hearing Date	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
4059 13/14 - MODIFICATIONS	December 15, 2014	PUBLIC HEALTH -- DPH	\$1,000,000	\$1,250,000	Contractor will provide specialized sexual reassignment surgeries (SRS), such as genital-related surgeries, not provided at San Francisco General Hospital for uninsured male-to-female and female-to-male transgender clients eligible for the Department's Sliding Scale and Healthy San Francisco programs.	01/01/2015	12/31/2018	REGULAR
4072-07/08 - MODIFICATIONS	December 15, 2014	PUBLIC UTILITIES COMMISSION -- PUC	\$32,000,000	\$70,000,000	Provide professional construction management services to oversee the Water System Improvement Program (WSIP) construction project of the Calaveras Dam Replacement Project on behalf of the SFPUC. The work includes inspection oversight and enforcement of contract requirements for construction protocols, seismic safety design and environmental mitigation measures. See Supplemental Attachment A.	08/03/2016	05/24/2019	REGULAR
4054-10/11 - MODIFICATIONS	December 15, 2014	POLICE -- POL	\$671,900	\$1,019,100	Contractor will provide maintenance on the Level II Message Switching Computer system. Modification is to renew maintenance contract for five years (3/10/15-3/9/20) and expand coverage for a total of 2500 licenses. Previous maintenance contract covered 3 years (3/10/12-3/9/15) of service for 1500 licenses.	03/10/2015	03/09/2020	REGULAR

TOTAL AMOUNT \$33,671,900

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

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR Dept. Code: AIR

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Investment Advisory Services

Funding Source: Airport Operating Funds PSC Duration: 5 years 28 weeks
PSC Amount: \$1,000,000 PSC Est. Start Date: 12/15/2014 PSC Est. End Date: 06/30/2020

1. **Description of Work**

A. Scope of Work:

To provide San Francisco International Airport (SFO) with general investment advisory services on an as-needed basis. This includes review of the investment policy and best practice recommendations for \$680 million of debt service reserve funds; advisory service on portfolio structure, security selection and periodic re-balancing of the portfolio; and preparation of detailed holding, activity or market condition reports on a daily, monthly or quarterly basis.

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

These services are necessary to ensure that bonds and other financial instruments are issued or refunded at the lowest possible interest cost and to create a market among investors. Denial of this service will prevent the successful sale(s) of these bonds and jeopardize the implementation of the Airport's future capital improvement plans.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
This work was previously perform under PSC 4098-09/10.

D. Will the contract(s) be renewed? Yes, if there continues to be a need for this service.

2. **Union Notification:** On 10/20/2014, the Department notified the following employee organizations of this PSC/RFP request: Prof & Tech Eng, Local 21, Municipal Executive Association,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43672 - 14/15

DHR Analysis/Recommendation:

Commission Approval Required

Civil Service Commission Action:

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
 The contractor must be a registered Investment Advisor by the Securities and Exchange Commission (SEC). They must work for a nationally known portfolio management firm with demonstrated experience providing investment advisory services for a large portfolio of municipal bond reserve funds.

B. Which, if any, civil service class(es) normally perform(s) this work?
 1117,9255,9258,0931,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Existing civil service classifications will be working closely with the Investment Advisor; however, the Advisor needs to be registered with the SEC and have the resources of a large Investment Firm to manage the portfolio of a large municipal bond reserve funds. Additionally the work is on an as-needed basis.

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

No. The investment advisory services require registration with the SEC, and will be required only on an as-needed basis.

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

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
 ON 11/17/2014 BY:

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

Address: P.O. Box 8097 San Francisco, CA 94128

Receipt of Union Notification(s)

From: DHR-PSCCoordinator, DHR (HRD) on behalf of Cynthia Avakian
To: Cynthia Avakian; L21PSCReview@ifpte21.org; camaguey@sfmea.com; staff@sfmea.com; Danielle Poole; Iser, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 43672 - 14/15
Date: Tuesday, October 21, 2014 3:32:22 AM

RECEIPT for Union Notification for PSC 43672 - 14/15 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 43672 - 14/15 for \$1,000,000 for Initial Request services for the period 12/15/2014 -- 06/30/2020. 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/4034> For union notification, please see the

TO: field of the email to verify receipt. If you do not see all the unions you

intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again, change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PSC 43672-14/15 – Financial Investment Advisory Services

Term Justification

The contracts will be for a five (5) year term to insure consistency in Investment Advisory services.

PERSONAL SERVICES CONTRACT SUMMARY

DATE: February 5, 2010

DEPARTMENT NAME: AIRPORT COMMISSION

DEPARTMENT NUMBER: 27

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

TYPE OF REQUEST: [X] INITIAL REQUEST [] MODIFICATION

TYPE OF SERVICE: Financial Advisory Services for the Airport's Capital Financing Program

FUNDING SOURCE: Combination of Revenue Bonds and Airport Operating Funds

PSC AMOUNT: \$12,500,000 (\$2,500,000/yr) PSC DURATION: July 1, 2010 to June 30, 2015

1. DESCRIPTION OF WORK

A. Concise description of proposed work:

Financial advisory services to manage San Francisco International Airport's capital financing program, including a \$4.1 billion debt portfolio. Services include but are not limited to, financial, investment, swap and rebate advisory services. These services have saved over \$145 million through successful refinancing of some of the Airport's bonds during the past two years.

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

These services are required to ensure that bonds and other financial instruments are issued or refunded at the lowest possible interest cost and to create a market among investors. A portion of the proposed PSC amount, up to \$1.3 million per year, or \$6.5 million, will only be paid if bonds or debt instruments are sold in the financial markets, and this amount comes out of the bond proceeds. Denial of this service will prevent the successful sale(s) of these bonds and jeopardize the implementation of the Airport's future capital improvement plans.

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

Financial advisory services have been contracted out, most recently under the approval of PSC # 4060-04/05.

D. Will the contract(s) be renewed? Yes; it is anticipated that the need for such services will continue.

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

IFPTE Local 21
Union Names

Cynthia P. Avakian
Signature of person mailing/faxing form

FEB 5 2010
Date

RFP sent to: IFPTE Local 21
Union Name

on January 25, 2010
Date

Cynthia P. Avakian
Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC # 4098-09/10
STAFF ANALYSIS/RECOMMENDATION:

Approved 3/15/10

CIVIL SERVICE COMMISSION ACTION:

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:

An excellent national reputation is needed to provide assurance and access to investors in the financial markets. The consultants must have knowledge and expertise in evaluating airport facility debt, identifying and analyzing financing alternatives, and developing financing plans for capital programs, taking into consideration the Airport's current debt structure, the impact on the Airport's rates and charges, the timing and cash flow requirements of projects, changes in tax law, and the conditions in the capital markets.

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

None. Small parts of the work may be done by the following classifications:

5105, Manager, Finance & Administration, "...is responsible for developing and managing the capital project financial plan; participating in issuance of bonds and maximizing non-bond revenue..."

5186, Financial Manager, "...directs department input into revenue bond authorizations and sales and general obligation bond authorizations and sales, including the development of relationships with rating agencies, underwriting firms, bond counsels, and bond trustees; may manage debt issuances."

9255, Airport Economic Planner, "...analyzes, recommends, coordinates, and where applicable, negotiates the financings of new Airport facilities and assesses the financial impact of the Airport's capital program on the debt service costs..." and

9258, Airport Assistant Deputy Director, Business & Finance, "...supervises the maintenance of a financial plan for capital project funding; coordinates the sale of airport bond issues, . . . and performs rate analysis for the optimal negotiation of rates, bond financing and budgeting with airlines and tenants..."

These classifications are responsible for analyzing and determining the appropriate alternatives in issuing or managing debt but not the provision of assurance to investors in the financial markets, nor the development of new financing instruments to take advantage of changes in interest rates.

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

No.

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable:

An objective evaluation of the Airport's financial standing by an outside entity is required by potential investors and the financial community before bonds or refinancing instruments can be accepted. Advice and financial services will only be needed if interest rates move in a direction that is advantageous for the Airport.

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

No; please see answer to Question 4A above.

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

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

Yes No

B. Will the contractor train City and County employees?

Yes No

- Describe the training and indicate approximate number of hours.
• Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate numbers to be trained.

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

Yes No

D. Are there federal or state grant requirements regarding the use of contractual services?

Yes No

E. Has a board or commission determined that contracting is the most effective way to provide this service? Attached is Airport Commission Resolution #09-0219.

Yes No

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? A RFP has been issued and it is unknown at this time the results of the competitive process.

Yes No

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

Cynthia P. Avakian
Signature of Departmental Personal Services Contract Coordinator
Cynthia P. Avakian
Print or Type Name
(650) 821-2014
Telephone Number

Airport Commission, Contracts Administration Unit
P.O. Box 8097, San Francisco, CA 94128

March 15, 2010 Regular Meeting

Civil Service Commission - March 15, 2010

MINUTES

Regular Meeting

March 15, 2010

2:00 p.m.

ROOM 400, CITY HALL

1 Dr. Carlton B. Goodlett Place

CALL TO ORDER

2:19 p.m.

ROLL CALL

President Morgan R. Gorrano	Present
Vice President E. Dennis Normandy	Present (Left at 3:25 p.m. Missed Ite #s 8-19)
Commissioner Donald A. Casper	Present
Commissioner Mary Y. Jung	Present

President Morgan R. Gorrone presided.

PUBLIC COMMENT ON MATTERS APPEARING ON THE AGENDA

- (1) Daniel Boreen requested to see the viewing file.
- (2) Steve Pitocchi, SEIU Local 1021 requested that PSC #s 4092-09/10, 4096-09/10, 4097-09/10, 4100-09/10 and 4103-09/10 be severed.
- (3) Wesley Wakeford, Attorney for Stephen Kloster commented on Item #12 and urged the Commission to objectively review all materials submitted.

APPROVAL OF MINUTES

Regular Meeting of February 1, 2010

March 1, 2010: Postpone to the meeting of March 15, 2010.

Action: Approve. (Vote of 4 to 0)

Regular Meeting of March 1, 2010

Action: Approve. (Vote of 4 to 0)

0024-10-8

Review of request for approval of proposed personal services contracts.
(Item No. 5)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4082-09/10	Municipal Transportation Agency	\$17,100,000 \$2,569,400	Provide separate professional parking garage management services at the Moscone Center Garage, North Beach/Vallejo Garage, Performing Arts Garage, and Polk/Bush Garage. Services include: oversight of collection, reconciliation and deposit of all parking & non-parking revenue; repair & maintenance of facilities and revenue control equipment; compliance with insurance & bond requirements; providing valet or valet-assisted parking services during special events; providing personnel for cashiering, janitorial & security.	Regular	12/31/12 2/29/12

4085-09/10	District Attorney	\$81,840	Provide services for elder abuse victims that include: outreach & support to victims of elder abuse; community presentations to educate regarding elder abuse and legal resources; consultation to prosecution team regarding legal issues in prosecuting financial, physical, emotional, or verbal abuse of elders.	Regular	06/30/12
------------	-------------------	----------	--	---------	----------

February 1, 2010:

(1) Approve request for proposed personal services contract #4082-09/10. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 2 to 1; Commissioner Gorrano dissents.) Continue to the meeting of March 1, 2010. (Three (3) votes are needed for Commission action.)

(2) Postpone PSC #4085-09/10 to the meeting of March 1, 2010.

March 1, 2010: Postpone to the meeting of March 15, 2010.

Speakers: Sheila Arcelona and Allen Kennedy, District Attorney's Office spoke on PSC #4085-09/10.

Action: Approve request for proposed personal services contracts. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0098-10-8

Review of request for approval of proposed personal services contract.
(Item No. 6)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4093-09/10	Police	\$400,000	Provide pre-employment polygraph screening on an as-needed basis for entry level police officers, police reserve officers, police cadets and police service aides. Such screening shall include questions regarding prior police history, criminal activity, illegal drug use, drinking habits and incidents of domestic violence. Services also include providing a business site with adequate interrogation facilities divided by one-way mirrors, and equipped with one way sound devices, video and audio recording equipment.	Regular	06/30/14

<p>4094-09/10</p>	<p>Public Health</p>	<p>\$1,300,000</p>	<p>Provide as-needed and after-hours security guard services, and as-needed guard/driver services for the Community Health Network, specifically for the Substance Abuse Services Unit of Ward 93, Opiate Treatment Outpatient Program (OTOP) at San Francisco General Hospital, the Silver Avenue Health Center Methadone/Office based opiate treatment program, Building 80/90 adjacent to the OTOP program, and armed guard/driver services for the operation of the Mobile Methadone Van(s).</p>	<p>Regular</p>	<p>06/30/15</p>
<p>4095-09/10</p>	<p>Public Works</p>	<p>\$3,000,000</p>	<p>Provide architectural services on an as-needed basis, for public building projects including but not limited to master plans, environmental reviews, programming and planning studies, assessments of existing facilities, green building evaluations, utility studies, design drawings, specifications, cost estimates, project schedules, adaptive re-use of existing facilities, modifications to life safety systems and other infrastructure, and new facilities.</p>	<p>Regular</p>	<p>08/30/15</p>

4096-09/10	Public Works	\$1,200,000	<p>The Materials Testing & Special Inspection (MTSI) Team will provide specialized materials testing & special inspection services for the SFPUC Head-quarters Building Project located at 525 Golden Gate Ave. Consultant will be City's representative leading & coordinating the materials testing & special inspection activities for the Project to ensure compliance with all requirements of state & local regulatory agencies including the international Building Code, California Building Code, SF Dept. of Building Inspection, Special Inspection & Structural Observation, and Contract Documents.</p>	Regular	08/01/12
4097-09/10	Public Works	\$200,000	<p>Provide additional services to continue as Executive Preservation Architect, & provide architectural & engineering design services for the final phase of the Palace of Fine Arts, which includes full consultant coordination. The scope of work includes lagoon stabilization on the western portion of the lagoon, coordinating new paving along the colonnade pathway & Rotunda, new lighting design, re-grading of the site, new sidewalk curbs, installation of new metal doors, landscaping & irrigation.</p>	Regular	07/01/11

<p>* 4098-09/10</p>	<p>Airport Commission</p>	<p>\$12,500,000</p>	<p>Provide financial advisory services to manage San Francisco International Airport's capital financing program, including a \$4.1 billion debt portfolio. Services include but are not limited to, financial, investment, swap and rebate advisory services.</p>	<p>Regular</p>	<p>06/30/15</p>
<p>4099-09/10</p>	<p>Airport Commission</p>	<p>\$2,500,000</p>	<p>Provide design & integration services for 1) Baggage Handling System (BHS) & inline explosive detection screening (EDS) systems at Terminal 3, Boarding Area E, International Terminal Building & other Airport BHS locations; services include 100% construction documents, full-service construction administration, quality control for BHS additions & modifications, 100% design & integration of programmable logic controls (PLC), pre-construction simulations, acceptance testing & integration; 2) Passenger Boarding Bridges (PBB); services include 100% construction documents, construction administration, quality control for complete PBB replacements, relocations and/or modifications, PBB integration with aircraft parking, fuel hydrant system, preconditioned air & ground power, acceptance testing with aircraft for a complete operating system.</p>	<p>Regular</p>	<p>05/31/13</p>

4100-09/10	Airport Commission	\$26,000,000	<p>Contractor will operate the Airport's Curbside Management Program for on-demand door-to-door van, taxicab, and limousine operations, provide customer services for air passengers seeking door-to-door transportation to leave the Airport, and facilitate services for people with special transportation needs. The contractor will monitor, coordinate and dispatch door-to-door vans, taxicabs and limousines in the holding/staging/waiting areas and curbside loading zones, as well as manage various systems supporting said operations at SFO. Airport ground transportation vehicle trip fees support the direct costs of the Program.</p>	Regular	06/30/16
4101-09/10	Airport Commission	\$375,000	<p>Provide customer survey data regarding the quality of the Airport's Food and Beverage and Retail Services, Parking, and other facilities and services. The surveys have consistently taken place in May for the past 19 years of at least 1,400 valid respondents to reflect the summer travel season. The preliminary results need to be analyzed and submitted to SFO within 30 days from the last interview. Vendor will produce, execute, and analyze the data and present results and recommendations to SFO.</p>	Regular	06/30/15

<p>4092-09/10</p>	<p>Police</p>	<p>Increase Amount \$60,000 New Amount \$90,000</p>	<p>The Veterinarian will provide routine and emergency medical care for up to twenty horses that are part of the San Francisco Police Department Mounted Unit. Routine services average fifteen visits per year. The Veterinarian will also perform pre-purchase horse examinations.</p>	<p>Modification</p>	<p>06/30/12</p>
<p>4102-07/08</p>	<p>Public Health</p>	<p>Increase Amount \$4,000,000 New Amount \$6,000,000</p>	<p>Will provide medical transportation services between medical facilities or a patient's home on an on-call basis, available 24 hours a day, 7 days a week. Contractor(s) may transport ambulatory or non-ambulatory patients to and from medical facilities utilizing specialized vehicles. Transportation services include patient discharges from San Francisco General Hospital, Public Health Centers or Laguna Honda Hospital; transporting voluntary mental health cases to appropriate psychiatric centers; providing Department with taxi vouchers or scripts for nonemergency services.</p>	<p>Modification</p>	<p>12/31/18</p>

March 1, 2010:

Postpone to the meeting of March 15, 2010.

Speakers: Sgt. Michael Zurcher, San Francisco Police Department spoke on PSC #4093-09/10.
Jacquie Hale, Department of Public Health and Sgt. Michael Zurcher, San Francisco Police Department spoke on PSC #4094-09/10.
Mark Dorian, Department of Public Works spoke on PSC #4095-09/10.
Brook Mebrahtu, Department of Public Works and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4096-09/10.
Toks Ajike, Recreation and Parks Department and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4097-09/10.

Speakers: Cynthia Avakian, Airport Commission and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4100-09/10.
Sgt. Robert Totah and Tom Newland, San Francisco Police Department and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4092-09/10.
Sharon Kwong, Department of Public Health spoke on PSC #4102-07/08.

Action: (1) Approve request for proposed personal services contract #4096-09/10 on the condition that the Department of Public Works engage in discussions with SEIU Local 1021. Should SEIU continue to have concerns about the contract, it may be put back on calendar for further discussion and action at the next regular meeting of April 5, 2010. In no case will the approval of the contract be delayed beyond the April 5, 2010 meeting. Notify the offices

of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

(2) Approve request for proposed personal services contract #4097-09/10 on the condition that contact be made with SEIU Local 1021 within 24 hours to address concerns they have with the PSC. In addition, that a response be provided to Local 1021 by the Recreation and Parks Department within the following 24 hours addressing their concerns after which the conditions of the Civil Service Commission approval would have been met. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

~~*~~ (3) Approve request for proposed personal services contracts on all remaining contracts. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0130-10-8 Review of request for approval of proposed personal services contract.
(Item No. 7)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4103-09/10	Police	\$140,000	Provide court reporting services and transcription as needed for disciplinary hearings and Police Commission meetings, along with transcription of tapes from interviews done with the Police Department's Management Control Division and other investigative units within the Police Department.	Regular	06/30/14

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION – AIR Dept. Code: AIR

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

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

Type of Service: Project Management Support Services (PMSS) / Design/Build (DB) for the Airport Hotel Program

Funding Source: Airport Capital Funds PSC Duration: 4 years 25 weeks
PSC Amount: \$200,000,000 PSC Est. Start Date: 01/01/2015 PSC Est. End Date: 06/30/2019

1. Description of Work

A. Scope of Work:

Project Management Support Services (PMSS) and Design Build (DB) service teams with hotel and transportation experience are required to manage the design and construction of the Airport Hotel Program. Services to be provided include project controls, scheduling, document control, design management, contract management, and architectural and engineering design services. The Airport Hotel Program encompasses three separate projects which require planning and coordination which are: the Airport Hotel, Air Train Station, and the Roadway Realignment project. The Airport Hotel and Air Train Station will require PMSS and DB services. The Roadway Realignment Project will require PMSS services only and will be overseen by Airport Civil Engineering staff. The Roadway Realignment project will relocate South McDonnell Road, relocate underground utilities, and create a new road leading to the Airport hotel.

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

The Airport Hotel Program will enhance the Airport's overall amenities, showcase the unique attributes of the Bay Area, and create revenue generating opportunities for the Airport. Airport staff does not have the expertise in hotel projects and elevated transportation system projects. For this reason, Airport staff seek PMSS and DB service consultants in these two areas of expertise. If the services for the Hotel Program are denied, the Program implementation will be delayed, resulting in loss of revenue generating opportunities and delaying improvements to the passengers' experience and amenities at the Airport.

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

D. Will the contract(s) be renewed? Yes, if there continues to be a need for such services at the Airport.

2. Union Notification: On 10/20/2014, the Department notified the following employee organizations of this PSC/RFP request: Prof & Tech Eng, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44959 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
 Specialized skills, knowledge, and expertise in hotel development, design management, including integration of hotel brand design standards, project and construction management are required. Experience in the design and construction of elevated transportation system projects is essential for the design and engineering of the new Air Train Station project.

B. Which, if any, civil service class(es) normally perform(s) this work?
 5201,5203,5207,5209,5211,5212,5214,5215,5216,5218,5219,5241,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Architectural and engineering classes exist but their expertise are not applicable to the development of hotels, working with hotel operators, and the development of a new Air Train Station. SFO Project Managers with expertise managing Airport asset development and construction projects will work with the Airport Hotel Program consultants to provide the required services.

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

No. The development of a major hotel and new Air Train Station does not occur frequently enough to adopt a permanent civil service class. Once the Hotel project and Air Train extension are completed the specialized services will not be required.

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

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
 ON 11/17/2014 BY:

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

Address: PO Box 8097 San Francisco, CA, 94128

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of cynthia.avakian@flysfo.com
To: [Cynthia Avakian](mailto:Cynthia.Avakian@iftete21.org); L21PSCReview@iftete21.org; [Theresa Lopez](#); [Isen, Richard \(TIS\)](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44959 - 14/15
Date: Monday, October 20, 2014 7:03:18 PM

RECEIPT for Union Notification for PSC 44959 - 14/15 more than \$100k

The AIRPORT COMMISSION -- AIR has submitted a request for a Personal Services Contract (PSC) 44959 - 14/15 for \$200,000,000 for Initial Request services for the period 01/01/2015 – 06/30/2019. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/4030> 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: AIRPORT COMMISSION – AIR Dept. Code: AIR

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

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

Type of Service: Airport Customer Survey

Funding Source: Airport Operating Funds PSC Duration: 6 years 25 weeks
PSC Amount: \$1,000,000 PSC Est. Start Date: 01/01/2015 PSC Est. End Date: 06/30/2021

1. Description of Work

A. Scope of Work:

Provide customer survey data regarding the quality of the San Francisco International Airport's (SFO) Food and Beverage and Retail Services, Parking, and other facilities and services, using the global survey product and methodology associated with the Airport Service Quality (ASQ) Program. ASQ is the only airport survey and services benchmarking program with global reach. The ASQ Program will include conducting 5,600 annual (1400 quarterly) on-site customer interviews. Contractor will use the ASQ Program to produce, execute, and analyze the data, producing results and recommendations to SFO.

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

SFO is committed to providing customer satisfaction through safe facilities, convenient, and pleasing services to the traveling public. SFO has been a participant of the ASQ survey process since 2011 and denial of this service would cause an interruption in the year-to-year benchmark comparison data. SFO would risk losing touch with its passenger user base, risking a reduction in passenger satisfaction and a loss in revenue.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC. This services has been provided under PSC #4101-09/10.

D. Will the contract(s) be renewed? Yes, if there continues to be a need for such services at SFO.

2. Union Notification: On 10/20/2014, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21, Municipal Executive Association,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45026 - 14/15

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 12/15/2014

Civil Service Commission Action:

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
Required skills include high-level of knowledge and expertise in conducting surveys including face-to-face interviews, telephone surveys, focus groups, mail-back surveys, etc.; questionnaire and sampling design; statistical analyses; and interviewing in various languages (English, French, Spanish, German, Japanese, Korean, Mandarin, Cantonese, etc.); and furnishing computerized survey data results. Also, experience with large Airport environments in developing recommendations based on industry successes is required.

B. Which, if any, civil service class(es) normally perform(s) this work?
1823,0922,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Civil service classifications are not applicable as the work is intermittent and entails a large number of people for a short period of time.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No, since the work is considered seasonal.

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

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

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

ON 11/17/2014 BY:

Name: Cynthia Avakian

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

Address: P.O. Box 8097

San Francisco, CA 94128

Receipt of Union Notification(s)

Christina Chiong

From: DHR-PSCCoordinator, DHR (HRD) on behalf of Cynthia Avakian
Sent: Monday, October 20, 2014 6:36 PM
To: Cynthia Avakian; L21PSCReview@ifpte21.org; camaguey@sfmea.com;
staff@sfmea.com; Danielle Poole; Isen, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 45026 - 14/15

RECEIPT for Union Notification for PSC 45026 - 14/15 more than \$100k

The AIRPORT COMMISSION – AIR has submitted a request for a Personal Services Contract (PSC) 45026 - 14/15 for \$1,000,000 for Initial Request services for the period 01/01/2015 – 06/30/2021. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/4037> 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

Christina Chiong (AIR)

From: Lisa Randall (AIR)
Sent: Friday, November 07, 2014 1:23 PM
To: Christina Chiong (AIR)
Subject: FW: PSC 45026-14/15

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Kim Carter Martinez [<mailto:kcarter@ifpte21.org>]
Sent: Friday, November 07, 2014 1:22 PM
To: Lisa Randall (AIR)
Subject: PSC 45026-14/15

Hi Lisa,

Thank you for spending the time with me today on a conference call in the above referenced matter. The Union has no objection to this PSC at this time.

Sincerely,

Kim Carter Martinez

Thanks,

Kim

Kim Carter Martinez
IFPTE Local 21, AFL-CIO
p:415-864-2100
f:415-864-2166
e:kcarter@ifpte21.org

This e-mail message and any attachments contain confidential information that is legally privileged and intended solely for the use of the addressee(s) named above. If you are not the intended recipient(s), or person responsible for delivering it to the intended recipient(s), you are hereby notified that any review, disclosure, copying, distribution or use of any of the information contained herein is strictly prohibited. If you have received this confidential communication in error, please contact the sender by reply e-mail and permanently delete the original transmission and any attachments without reading or saving in any manner.

Christina Chiong (AIR)

From: Lisa Randall (AIR)
Sent: Friday, November 07, 2014 1:24 PM
To: Christina Chiong (AIR)
Subject: FW: PSC 45026 - 14/15

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Lisa Randall (AIR)
Sent: Friday, October 31, 2014 9:12 AM
To: 'Kim Carter Martinez'
Cc: Christina Chiong (AIR); Christopher Birch (AIR); Stephanie Francisco (AIR)
Subject: RE: PSC 45026 - 14/15

Hi Kim,

Friday Nov. 7th at 1PM works for us. I'll send everyone a phone appointment shortly.

I thank you,
Lisa

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Kim Carter Martinez [<mailto:kcarter@ifpte21.org>]
Sent: Thursday, October 30, 2014 4:07 PM
To: Lisa Randall (AIR)
Cc: Christina Chiong (AIR); Christopher Birch (AIR); Stephanie Francisco (AIR)
Subject: RE: PSC 45026 - 14/15

Unfortunately, my time next week is very limited because I am in a Civil Service Commission Hearing in Alameda County most of the week. My availability over the next two weeks is as follows:

Friday the 7th at 1pm or 4:30pm
Wednesday the 12th at 10am or 2pm
Thursday the 13th at 3:30pm
Friday the 14th at 10am or 2pm

Thank you,

Kim Carter Martinez

Thanks,

Kim

Kim Carter Martinez
IFPTE Local 21, AFL-CIO
p:415-864-2100
f:415-864-2166
e:kcarter@ifpte21.org

This e-mail message and any attachments contain confidential information that is legally privileged and intended solely for the use of the addressee(s) named above. If you are not the intended recipient(s), or person responsible for delivering it to the intended recipient(s), you are hereby notified that any review, disclosure, copying, distribution or use of any of the information contained herein is strictly prohibited. If you have received this confidential communication in error, please contact the sender by reply e-mail and permanently delete the original transmission and any attachments without reading or saving in any manner.

From: Lisa Randall (AIR) [mailto:Lisa.Randall@flysfo.com]
Sent: Thursday, October 30, 2014 4:00 PM
To: Kim Carter Martinez
Cc: Christina Chiong (AIR); Christopher Birch (AIR); Stephanie Francisco (AIR)
Subject: RE: PSC 45026 - 14/15

Hi Kim,

Can you please give me your availability for times next week?

Thank you,
Lisa

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Kim Carter Martinez [mailto:kcarter@ifpte21.org]
Sent: Monday, October 27, 2014 4:49 PM
To: Lisa Randall (AIR)
Subject: RE: PSC 45026 - 14/15

No. If the times I sent don't work for you, we will have to look at next week.

Thanks,

Kim

Kim Carter Martinez
IFPTE Local 21, AFL-CIO
p:415-864-2100
f:415-864-2166
e:kcarter@ifpte21.org

This e-mail message and any attachments contain confidential information that is legally privileged and intended solely for the use of the addressee(s) named above. If you are not the intended recipient(s), or person responsible for delivering it to the intended recipient(s), you are hereby notified that any review, disclosure, copying, distribution or use of any of the information contained herein is strictly prohibited. If you have received this confidential communication in error, please contact the sender by reply e-mail and permanently delete the original transmission and any attachments without reading or saving in any manner.

From: Lisa Randall (AIR) [mailto:Lisa.Randall@flysfso.com]
Sent: Monday, October 27, 2014 4:38 PM
To: Kim Carter Martinez
Subject: RE: PSC 45026 - 14/15

Hi Kim,

Are you available anytime this Thursday afternoon?

Thanks,
Lisa

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Kim Carter Martinez [mailto:kcarter@ifpte21.org]
Sent: Friday, October 24, 2014 1:58 PM
To: Lisa Randall (AIR)
Cc: Christopher Birch (AIR); Stephanie Francisco (AIR)
Subject: RE: PSC 45026 - 14/15

I'm available next week at 10am on Wednesday the 29th or Friday the 31st also at 10.

Thanks,

Kim

Kim Carter Martinez
IFPTE Local 21, AFL-CIO
p:415-864-2100
f:415-864-2166
e:kcarter@ifpte21.org

This e-mail message and any attachments contain confidential information that is legally privileged and intended solely for the use of the addressee(s) named above. If you are not the intended recipient(s), or person responsible for delivering it to the intended recipient(s), you are hereby notified that any review, disclosure, copying, distribution or use of any of the information contained herein is strictly prohibited. If you have received this confidential communication in error, please contact the sender by reply e-mail and permanently delete the original transmission and any attachments without reading or saving in any manner.

From: Lisa Randall [mailto:Lisa.Randall@flysfso.com]
Sent: Thursday, October 23, 2014 4:24 PM
To: Kim Carter Martinez
Cc: Christopher Birch; Stephanie Francisco
Subject: FW: PSC 45026 - 14/15

Hi Kim,

Please let me your availability for the next few days and I can set up a conference call with yourself and the contract manager for these services.

Thank you,
Lisa

Lisa Randall MA
Contracts Administration Unit
Phone: (650) 821-2012 | Fax: (650) 821-2011

From: Kim Carter Martinez [mailto:kcarter@ifpte21.org]
Sent: Tuesday, October 21, 2014 9:48 AM
To: Cynthia Avakian
Subject: PSC 45026 - 14/15

Dear Cynthia,

Local 21 is in receipt of PSC 45026-14/15. We would like to set up a time to discuss this PSC and get more information as to why Civil Service Employees can not do this work. Please contact me either via email at kcarter@ifpte21.org or via phone at 415-864-2100 to discuss. Thank you,

Kim Carter Martinez

Thanks,

Kim

Kim Carter Martinez
IFPTE Local 21, AFL-CIO
p:415-864-2100
f:415-864-2166
e:kcarter@ifpte21.org

This e-mail message and any attachments contain confidential information that is legally privileged and intended solely for the use of the addressee(s) named above. If you are not the intended recipient(s), or person responsible for delivering it to the intended recipient(s), you are hereby notified that any review, disclosure, copying, distribution or use of any of the information contained herein is strictly prohibited. If you have received this confidential communication in error, please contact the sender by reply e-mail and permanently delete the original transmission and any attachments without reading or saving in any manner.

Additional Attachment(s)

PSC# 45026-14/15

For all PSCs if the duration requested is 5 years or more, an explanation is required- historical PSC required:

The PSC term corresponds to the anticipated contract duration of five (5) years, plus an additional 6-months, through the end of the following fiscal year, with the anticipated term of January 1, 2015, through June 30, 2021. The requested PSC term ties to SFO's five (5)-year strategic plan.

PERSONAL SERVICES CONTRACT SUMMARY

DATE: February 5, 2010 Amended February 9, 2010

DEPARTMENT NAME: AIRPORT COMMISSION

DEPARTMENT NUMBER: 27

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

TYPE OF REQUEST: [X] INITIAL REQUEST [] MODIFICATION

TYPE OF SERVICE: Airport Customer Survey

FUNDING SOURCE: Airport Operating Funds

PSC AMOUNT: \$375,000 (\$75,000/yr) PSC DURATION: May 1, 2010 to June 30, 2015

1. DESCRIPTION OF WORK

A. Concise description of proposed work:

Provide customer survey data regarding the quality of the Airport's Food and Beverage and Retail Services, Parking, and other facilities and services. The surveys have consistently taken place in May for the past 19 years of at least 1,400 valid respondents to reflect the summer travel season. The preliminary results need to be analyzed and submitted to SFO within 30 days from the last interview. Vendor will produce, execute, and analyze the data and present results and recommendations to SFO.

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

The Airport is committed to providing customer satisfaction through safe, convenient, and pleasing facilities and services to the flying public. Without this service, there would be an interruption of the year-to-year and benchmark comparison data, the Airport would lose touch with its passenger user base and may suffer a reduction in passenger satisfaction and/or revenues.

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

This has been done by a contractor since an independent assessment of the Airport's operations is needed.

D. Will the contract(s) be renewed? Yes, if there continues to be a need for such services at the Airport.

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

Table with 3 columns: Union Name, Signature of person mailing/faxing form, Date. Rows for IFPTE Local 21 and SEIU, Local 1021, both signed by Cynthia P. Avakian on FEB 5 2010.

RFP sent to: Union Name on Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC # 4101-09/10
STAFF ANALYSIS/RECOMMENDATION:

Approved 3/15/10

CIVIL SERVICE COMMISSION ACTION:

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:

The contractor is required to have a high level of knowledge and expertise in conducting face-to-face interviews, telephone surveys, focus groups, mail-back surveys, and other surveys; the design of questionnaires; sampling design; statistical analyses; interviewing in English, French, Spanish, German, Japanese, Korean, Mandarin, and Cantonese, and other languages as required by the Airport; and furnishing computerized survey data results. The contractor uses their experience in varied, large Airport environments to develop recommendations based on industry successes.

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

1820 Junior Administrative Analyst or 1822 Administrative Analyst may be able to perform a portion of the work.

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

No

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable:

Civil service classifications are not applicable as the work is intermittent and entails a large number of people for short periods of time.

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

No, since the work is considered seasonal.

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

Yes No

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

B. Will the contractor train City and County employees?

- Describe the training and indicate approximate number of hours.
- Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate numbers to be trained.

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

D. Are there federal or state grant requirements regarding the use of contractual services?

E. Has a board or commission determined that contracting is the most effective way to provide this service? Attached is Airport Commission Resolution #09-0283.

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? A RFP for this contact will be issued shortly so the results of the competitive process are not known at this time.

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

Signature of Departmental Personal Services Contract Coordinator

Cynthia P. Avakian

(650) 821-2014

Print or Type Name

Telephone Number

Airport Commission, Contracts Administration Unit
P.O. Box 8097, San Francisco, CA 94128

Address

March 15, 2010 Regular Meeting

Civil Service Commission - March 15, 2010

MINUTES

Regular Meeting

March 15, 2010

2:00 p.m.

ROOM 400, CITY HALL

1 Dr. Carlton B. Goodlett Place

CALL TO ORDER

2:19 p.m.

ROLL CALL

President Morgan R. Gorrano	Present
Vice President E. Dennis Normandy	Present (Left at 3:25 p.m. Missed lte #s 8-19)
Commissioner Donald A. Casper	Present
Commissioner Mary Y. Jung	Present

President Morgan R. Gorrano presided.

PUBLIC COMMENT ON MATTERS APPEARING ON THE AGENDA

- (1) Daniel Boreen requested to see the viewing file.
- (2) Steve Pitocchi, SEIU Local 1021 requested that PSC #s 4092-09/10, 4096-09/10, 4097-09/10, 4100-09/10 and 4103-09/10 be severed.
- (3) Wesley Wakeford, Attorney for Stephen Kloster commented on Item #12 and urged the Commission to objectively review all materials submitted.

APPROVAL OF MINUTES

Regular Meeting of February 1, 2010

March 1, 2010: Postpone to the meeting of March 15, 2010.

Action: Approve. (Vote of 4 to 0)

Regular Meeting of March 1, 2010

Action: Approve. (Vote of 4 to 0)

0024-10-8

Review of request for approval of proposed personal services contracts.
(Item No. 5)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4082-09/10	Municipal Transportation Agency	\$17,100,000 \$2,569,400	Provide separate professional parking garage management services at the Moscone Center Garage, North Beach/Vallejo Garage, Performing Arts Garage, and Polk/Bush Garage. Services include: oversight of collection, reconciliation and deposit of all parking & non-parking revenue; repair & maintenance of facilities and revenue control equipment; compliance with insurance & bond requirements; providing valet or valet-assisted parking services during special events; providing personnel for cashiering, janitorial & security.	Regular	12/31/12 2/29/12

4085-09/10	District Attorney	\$81,840	Provide services for elder abuse victims that include: outreach & support to victims of elder abuse; community presentations to educate regarding elder abuse and legal resources; consultation to prosecution team regarding legal issues in prosecuting financial, physical, emotional, or verbal abuse of elders.	Regular	06/30/12
------------	-------------------	----------	--	---------	----------

February 1, 2010:

(1) Approve request for proposed personal services contract #4082-09/10. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 2 to 1; Commissioner Gorrone dissents.) Continue to the meeting of March 1, 2010. (Three (3) votes are needed for Commission action.)

(2) Postpone PSC #4085-09/10 to the meeting of March 1, 2010.

March 1, 2010: Postpone to the meeting of March 15, 2010.

Speakers: Sheila Arcelona and Allen Kennedy, District Attorney's Office spoke on PSC #4085-09/10.

Action: Approve request for proposed personal services contracts. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0098-10-8 Review of request for approval of proposed personal services contract.
 (Item No. 6)

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4093-09/10	Police	\$400,000	Provide pre-employment polygraph screening on an as-needed basis for entry level police officers, police reserve officers, police cadets and police service aides. Such screening shall include questions regarding prior police history, criminal activity, illegal drug use, drinking habits and incidents of domestic violence. Services also include providing a business site with adequate interrogation facilities divided by one-way mirrors, and equipped with one way sound devices, video and audio recording equipment.	Regular	06/30/14

4094-09/10	Public Health	\$1,300,000	Provide as-needed and after-hours security guard services, and as-needed guard/driver services for the Community Health Network, specifically for the Substance Abuse Services Unit of Ward 93, Opiate Treatment Outpatient Program (OTOP) at San Francisco General Hospital, the Silver Avenue Health Center Methadone/Office based opiate treatment program, Building 80/90 adjacent to the OTOP program, and armed guard/driver services for the operation of the Mobile Methadone Van(s).	Regular	06/30/15
4095-09/10	Public Works	\$3,000,000	Provide architectural services on an as-needed basis, for public building projects including but not limited to master plans, environmental reviews, programming and planning studies, assessments of existing facilities, green building evaluations, utility studies, design drawings, specifications, cost estimates, project schedules, adaptive re-use of existing facilities, modifications to life safety systems and other infrastructure, and new facilities.	Regular	08/30/15

<p>4096-09/10</p>	<p>Public Works</p>	<p>\$1,200,000</p>	<p>The Materials Testing & Special Inspection (MTSI) Team will provide specialized materials testing & special inspection services for the SFPUC Head-quarters Building Project located at 525 Golden Gate Ave. Consultant will be City's representative leading & coordinating the materials testing & special inspection activities for the Project to ensure compliance with all requirements of state & local regulatory agencies including the international Building Code, California Building Code, SF Dept. of Building Inspection, Special Inspection & Structural Observation, and Contract Documents.</p>	<p>Regular</p>	<p>08/01/12</p>
<p>4097-09/10</p>	<p>Public Works</p>	<p>\$200,000</p>	<p>Provide additional services to continue as Executive Preservation Architect, & provide architectural & engineering design services for the final phase of the Palace of Fine Arts, which includes full consultant coordination. The scope of work includes lagoon stabilization on the western portion of the lagoon, coordinating new paving along the colonnade pathway & Rotunda, new lighting design, re-grading of the site, new sidewalk curbs, installation of new metal doors, landscaping & irrigation.</p>	<p>Regular</p>	<p>07/01/11</p>

4098-09/10	Airport Commission	\$12,500,000	Provide financial advisory services to manage San Francisco International Airport's capital financing program, including a \$4.1 billion debt portfolio. Services include but are not limited to, financial, investment, swap and rebate advisory services.	Regular	06/30/15
4099-09/10	Airport Commission	\$2,500,000	Provide design & integration services for 1) Baggage Handling System (BHS) & inline explosive detection screening (EDS) systems at Terminal 3, Boarding Area E, International Terminal Building & other Airport BHS locations; services include 100% construction documents, full-service construction administration, quality control for BHS additions & modifications, 100% design & integration of programmable logic controls (PLC), pre-construction simulations, acceptance testing & integration; 2) Passenger Boarding Bridges (PBB); services include 100% construction documents, construction administration, quality control for complete PBB replacements, relocations and/or modifications, PBB integration with aircraft parking, fuel hydrant system, preconditioned air & ground power, acceptance testing with aircraft for a complete operating system.	Regular	05/31/13

4100-09/10	Airport Commission	\$26,000,000	<p>Contractor will operate the Airport's Curbside Management Program for on-demand door-to-door van, taxicab, and limousine operations, provide customer services for air passengers seeking door-to-door transportation to leave the Airport, and facilitate services for people with special transportation needs. The contractor will monitor, coordinate and dispatch door-to-door vans, taxicabs and limousines in the holding/staging/waiting areas and curbside loading zones, as well as manage various systems supporting said operations at SFO. Airport ground transportation vehicle trip fees support the direct costs of the Program.</p>	Regular	06/30/16
4101-09/10	Airport Commission	\$375,000	<p>Provide customer survey data regarding the quality of the Airport's Food and Beverage and Retail Services, Parking, and other facilities and services. The surveys have consistently taken place in May for the past 19 years of at least 1,400 valid respondents to reflect the summer travel season. The preliminary results need to be analyzed and submitted to SFO within 30 days from the last interview. Vendor will produce, execute, and analyze the data and present results and recommendations to SFO.</p>	Regular	06/30/15

4092-09/10	Police	<p>Increase Amount \$60,000 New Amount \$90,000</p>	<p>The Veterinarian will provide routine and emergency medical care for up to twenty horses that are part of the San Francisco Police Department Mounted Unit. Routine services average fifteen visits per year. The Veterinarian will also perform pre-purchase horse examinations.</p>	Modification	06/30/12
4102-07/08	Public Health	<p>Increase Amount \$4,000,000 New Amount \$6,000,000</p>	<p>Will provide medical transportation services between medical facilities or a patient's home on an on-call basis, available 24 hours a day, 7 days a week. Contractor(s) may transport ambulatory or non-ambulatory patients to and from medical facilities utilizing specialized vehicles. Transportation services include patient discharges from San Francisco General Hospital, Public Health Centers or Laguna Honda Hospital; transporting voluntary mental health cases to appropriate psychiatric centers; providing Department with taxi vouchers or scripts for nonemergency services.</p>	Modification	12/31/18

March 1, 2010: Postpone to the meeting of March 15, 2010.

Speakers:

Sgt. Michael Zurcher, San Francisco Police Department spoke on PSC #4093-09/10.
Jacquie Hale, Department of Public Health and Sgt. Michael Zurcher, San Francisco Police Department spoke on PSC #4094-09/10.
Mark Dorian, Department of Public Works spoke on PSC #4095-09/10.
Brook Mebrahtu, Department of Public Works and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4096-09/10.
Toks Ajike, Recreation and Parks Department and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4097-09/10.

Speakers:


Cynthia Avakian, Airport Commission and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4100-09/10.
Sgt. Robert Totah and Tom Newland, San Francisco Police Department and Steve Pitocchi, SEIU Local 1021 spoke on PSC #4092-09/10.
Sharon Kwong, Department of Public Health spoke on PSC #4102-07/08.

Action:

(1) Approve request for proposed personal services contract #4096-09/10 on the condition that the Department of Public Works engage in discussions with SEIU Local 1021. Should SEIU continue to have concerns about the contract, it may be put back on calendar for further discussion and action at the next regular meeting of April 5, 2010. In no case will the approval of the contract be delayed beyond the April 5, 2010 meeting. Notify the offices

of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

(2) Approve request for proposed personal services contract #4097-09/10 on the condition that contact be made with SEIU Local 1021 within 24 hours to address concerns they have with the PSC. In addition, that a response be provided to Local 1021 by the Recreation and Parks Department within the following 24 hours addressing their concerns after which the conditions of the Civil Service Commission approval would have been met. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

 (3) Approve request for proposed personal services contracts on all remaining contracts. Notify the offices of the Controller and the Office of Contract Administration. (Vote of 4 to 0)

0130-10-8

**Review of request for approval of proposed personal services contract.
(Item No. 7)**

PSC#	Department	Amount	Type of Service	Type of Approval	Duration
4103-09/10	Police	\$140,000	Provide court reporting services and transcription as needed for disciplinary hearings and Police Commission meetings, along with transcription of tapes from interviews done with the Police Department's Management Control Division and other investigative units within the Police Department.	Regular	06/30/14

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: DEPARTMENT OF EMERGENCY MANAGEMENT – ECD Dept. Code: ECD

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Pre-Employment Psychological Evaluation Services

Funding Source: general fund PSC Duration: 5 years 25 weeks
PSC Amount: \$250,000 PSC Est. Start Date: 01/01/2015 PSC Est. End Date: 06/30/2020

1. Description of Work

A. Scope of Work:

The selected vendor will perform required psychological evaluations and provide written summary and assessment reports for all selected candidates as part of their final selection process for hiring positions in the Department of Emergency Management's Division of Emergency Communications (DEC).

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

As required by law, the permanent civil service selection process for certain positions include a requirement that candidates submit to and successfully complete a psychological examination prior to employment. The consequences of denial would prevent the department from hiring DEC candidates.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
PSC# 3078-10/11 on April 20, 2011.

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

2. Union Notification: On 09/16/2014, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41436 - 14/15

Civil Service Commission Action:

DHR Analysis/Recommendation:

Commission Approval Required

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
Psychological examiners, pursuant to section 1031 (f) of the California Code of Regulations, are required to have a Ph.D. in Psychology with at least five years of post graduate experience in diagnosis and treatment of emotional and mental disorders.

B. Which, if any, civil service class(es) normally perform(s) this work?
2574,2576,

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
Yes, the vendor would utilize proprietary software to track and assess all candidates.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Due to the restrictive skills and experience requirements of the California Code of Regulations, and the as needed - on demand nature of the work, it is impractical to utilize a civil service class to perform the work.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No, because this service is utilized on an as-needed, on demand basis.

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

YES NO

- A. Will the contractor directly supervise City and County employee? YES NO
- B. Will the contractor train City and County employee? YES NO
- C. Are there legal mandates requiring the use of contractual services? YES NO
- D. Are there federal or state grant requirements regarding the use of contractual services? YES NO
- E. Has a board or commission determined that contracting is the most effective way to provide this service? YES NO
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? YES NO

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 09/17/2014 BY:

Name: William Lee Phone: 415-558-3866 Email: william.lee@sfgov.org

Address: 1011 Turk Street San Francisco, CA 94102

Receipt of Union Notification(s)

han, Grace (ECD)

om: dhr-psccoordinator@sfgov.org on behalf of william.lee@sfgov.org
nt: Wednesday, September 17, 2014 10:23 AM
o: Lee, William (ECD); local200twu@sbcglobal.net; rmitcheil@twusf.org; grojo@local39.org; sfsmsa@gmail.com; leah.berlanga@seiu1021.org; davidmkersten@gmail.com; tiya.thlang@seiu1021.org; ablood@cirselu.org; xiumin.li@seiu1021.org; Poon, SinYee (HSA); david.canham@seiu1021.org; joe.tannej@seiu1021.net; Larry.Bradshaw@seiu1021.org; pkarinen@ncctc.org; jduritz@uapd.com; cityworker@sfcwu.org; camaguey@sfmea.com; staff@sfmea.com; LIUNA.local261@gmail.com; hodlocal@pacbell.net; mshelley@dc16.us; mike@dc16.us; gall@sffdlocal798.org; khughes@ibew6.org; ecdemvoter@aol.com; djohnson@opcmialocal300.org; tony@dc16.us; smcgarry@ncctc.org; stevek@bac3-ca.org; speedy4864@aol.com; L21PSCReview@ifpte21.org; Chan, Grace (ECD); Isen, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)
bject: Receipt of Notice for new PCS over \$100K PSC # 41436 - 14/15

ECEIPT for Union Notification for PSC 41436 - 14/15 more than \$100k

DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD has submitted a request for a Personal Services Contract (PSC) 41436 - 14/15 for \$250,000 for Initial Request services for the period 01/01/2015 -- 06/30/2020. Notification of 30 days

10/1
5/1
ay for SEIU) is required.

fter logging into the system please select link below, view the Information and verify receipt:

<http://apps.sfgov.org/dhrrupal/node/3926> For union notification, please see the

o: 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
re 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
ne state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)



Edwin M. Lee
Mayor

Department of Emergency Management
1011 Turk Street, San Francisco, CA 94102

Division of Emergency Communications
Phone: (415) 558-3800 Fax: (415) 558-3843

Division of Emergency Services
Phone: (415) 487-5000 Fax: (415) 487-5043



Anne Kronenberg
Executive Director

MEMORANDUM

TO: Suzanne Choi, DHR PSC Coordinator
Department of Human Resources

FROM: William Lee, Deputy Director of Administration and Support
Department of Emergency Management

DATE: September 17, 2014

RE: PSC Duration Exceeding 5 Years – Polygraph & Psychological Exams

The Department of Emergency Management (DEM) has submitted two PSC requests (#41396-14/15 and #41436-14/15) for professional services related to the hiring of 9-1-1 Operations personnel.

DEM provides the 911 emergency and non-emergency Police, Fire and emergency medical call taking and dispatch services for the City and County of San Francisco. In order to fulfill these critical public safety functions, DEM maintains a minimum staffing model for a 24x7x365 operating call center. The most integral component for staffing the 9-1-1 center is the availability of dispatch staff.

To that end, DEM has worked with the Mayor's Budget Office to develop a long-term dispatcher hiring plan. Because public safety communications dispatchers are subject to California Peace Officer Standards and Training (POST) requirements, all new hires must complete the following recruitment criteria:

- Successful completion of a Polygraph Exam
- Successful completion of a Psychological Evaluation
- Successful completion of a Background Investigation

Given the stringent requirements above, DEM is requesting that the duration of these PSC requests be allowed to exceed five (5) years in order to ensure consistency in the Department's hiring process for public safety communications personnel.

If you have any questions regarding this matter, please feel free to contact me at 415-558-3866.

California Government Code Section 1031

1031. Each class of public officers or employees declared by law to be peace officers shall meet all of the following minimum standards:

(a) Be a citizen of the United States or a permanent resident alien who is eligible for and has applied for citizenship, except as provided in Section 2267 of the Vehicle Code.

(b) Be at least 18 years of age.

(c) Be fingerprinted for purposes of search of local, state, and national fingerprint files to disclose a criminal record.

(d) Be of good moral character, as determined by a thorough background investigation.

(e) Be a high school graduate, pass the General Education Development Test indicating high school graduation level, pass the California High School Proficiency Examination, or have attained a two-year, four-year, or advanced degree from an accredited college or university. The high school shall be either a United States public school, an accredited United States Department of Defense high school, or an accredited or approved public or nonpublic high school. Any accreditation or approval required by this paragraph shall be from a state or local government educational agency using local or state government approved accreditation, licensing, registration, or other approval standards, a regional accrediting association, an accrediting association recognized by the Secretary of the United States Department of Education, an accrediting association holding full membership in the National Council for Private School Accreditation (NCPSA), an organization holding full membership in the Commission on International and Trans-Regional Accreditation (CITA), an organization holding full membership in the Council for American Private Education (CAPE), or an accrediting association recognized by the National Federation of Nonpublic School State Accrediting Associations (NFNSSAA).

(f) Be found to be free from any physical, emotional, or mental condition that might adversely affect the exercise of the powers of a peace officer.

(1) Physical condition shall be evaluated by a licensed physician and surgeon.

(2) Emotional and mental condition shall be evaluated by either of the following:

(A) A physician and surgeon who holds a valid California license to practice medicine, has successfully completed a postgraduate medical residency education program in psychiatry accredited by the Accreditation Council for Graduate Medical Education, and has at least the equivalent of five full-time years of experience in the

diagnosis and treatment of emotional and mental disorders, including the equivalent of three full-time years accrued after completion of the psychiatric residency program.

Section: [Previous](#) [1027.5](#) [1028](#) [1028.1](#) [1028.2](#) [1029](#) [1029.1](#) [1030](#) [1031](#) [1031.1](#) [1031.2](#) [1031.5](#)
[1040](#) [1041](#) [1042](#) [1043](#) [Next](#)

PERSONAL SERVICES CONTRACT SUMMARY

DATE: 04/18/2011

DEPARTMENT NAME: Emergency Management DEPARTMENT NUMBER: 77

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

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

TYPE OF SERVICE: Pre-Employment Psychological Services

FUNDING SOURCE: General Fund (IG-AGF-AAA)

PSC AMOUNT: \$28,000.00 PSC DURATION: 07/01/2011 to 06/30/2013

1. DESCRIPTION OF WORK

A. Concise description of proposed work: The selected vendor will perform required psychological evaluations and provide written summary and assessment reports for all selected candidates as part of their final selection process for entry positions in the Department of Emergency Management's Division of Emergency Communications (DEC).

B. Explain why this service is necessary and the consequences of denial: As required by law, the permanent civil service selection process for certain positions include a requirement that candidates submit to and successfully complete a psychological examination prior to employment. The consequences of denial would prevent the department from hiring DEC candidates.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number): PSC# 4125-06/07.

D. Will the contract(s) be renewed: Unknown at this time.

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

Table with 3 columns: Union Name, Signature of person mailing / faxing form, Date. Rows include L21 and MEA.

RFP sent to N/A on [] on [] Signature []

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3078-10/11

Approval Date: 4/20/11

By: [Signature]

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

- A. Specify required skills and/or expertise: Psychological examiners, pursuant to section 1031 (f) of the California Code of Regulations, are required to have a Ph.D. in Psychology with at least five years of post graduate experience in diagnosis and treatment of emotional and mental disorders.
- B. Which, if any, civil service class normally performs this work? Although there are classifications that may perform psychological examinations, such as class 2574 Clinical Psychologist & 2576 Supervising Clinical Psychologist, those classes do not fulfill the requirements of Section 1031 (f) of the California Code of Regulations.
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: Yes, the vendor would utilize proprietary software to track and assess all candidates.

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

- A. Explain why civil service classes are not applicable: Due to the restrictive skills and experience requirements of the California Code of Regulations, and the as needed - on demand nature of the work, it is impractical to utilize a civil service class to perform the work.
- B. Would it be practical to adopt a new civil service class to perform this work? Explain: No, because this service is utilized on an as-needed, on demand basis.

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

- A. Will the contractor directly supervise City and County employees? Yes No
- B. Will the contractor train City and County employees?
 - Describe training and indicate approximate number of hours.
 - Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate number to be trained.
- C. Are there legal mandates requiring the use of contractual services?
- D. Are there federal or state grant requirements regarding the use of contractual services?
- E. Has a board or commission determined that contracting is the most effective way to provide this service?
- F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?

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

[Handwritten Signature]

Signature of Departmental Personal Services Contract Coordinator

WILL LEE

415-558-3866

Print or Type Name

Telephone Number

1011 TUNK ST.

SF, CA 94102

Address

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD Dept. Code: ECD

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Website and Grants Management Database

Funding Source: Federal Homeland Security Grant PSC Duration: 2 years 50 weeks

PSC Amount: \$200,000 PSC Est. Start Date: 01/15/2015 PSC Est. End Date: 12/31/2017

1. **Description of Work**

A. Scope of Work:

Contractor will provide web design services to support the execution of an upgraded website to better promote the Urban Areas Security Initiative (UASI) program and its regional projects. The enhanced website will be easy to navigate, provide for a grants management system for partner jurisdictions to perform fiscal grants management activities, and have enough capacity to allow for the addition of audio/video presentations, webinars, and other multi-media needs.

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

The UASI Region is comprised of twelve counties and three core cities, which together receive federal funding to combat and respond to terrorism and related catastrophic disasters throughout the entire Bay Area. As a regional program, all jurisdictions must be able to easily communicate and access information from our website. (See Attached)

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
The website was designed and developed by a contractor (FGI Seattle LLC) under PSC# 3100-11/12

D. Will the contract(s) be renewed? Based on need, performance, and funding availability

2. **Union Notification:** On 10/16/2014, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21, Municipal Executive Association,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44337 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 12/15/2014

-60-

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise:
 The service requires extensive experience working within and across county lines in order to facilitate the production of a product that is of mutual benefit to all stakeholders involved. The provider must have an understanding of how the unique characteristics of each member county impacts the entire UASI Region. The service also requires extensive knowledge in emergency response planning and Federal Emergency Management Agency (FEMA) and California Office of Emergency Services (CalOES) grant requirements.
- B. Which, if any, civil service class(es) normally perform(s) this work?
 1823,0922,
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
 No.

4. Why Classified Civil Service Cannot Perform

- A. Explain why civil service classes are not applicable:
 Conditions of this grant include a personnel cap limit that has already been reached. No additional funds can be used towards personnel costs. Also, because this project spans across twelve counties it would be best to enlist a provider not associated with any of the counties.
- B. Would it be practical to adopt a new civil service class to perform this work? Explain.
 The regional, state, and national interaction required to perform this service would make it impractical for a SF Civil Service employee to perform this work for and on behalf of other counties. Also, we have reached the personnel cap on this time limited grant.

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

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 11/18/2014 BY:

Name: William Lee Phone: 415-558-3866 Email: william.lee@sfgov.org

Address: 1011 Turk Street San Francisco, CA 94102

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of william.lee@sfgov.org
Sent: Thursday, October 16, 2014 9:23 AM
To: Lee, William (ECD); L21PSCReview@ifpte21.org; camaguey@sfmea.com;
staff@sfmea.com; Kim-Molina, Mikyung (ECD); Isen, Richard (TIS); DHR-PSCCoordinator,
DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44337 - 14/15

RECEIPT for Union Notification for PSC 44337 - 14/15 more than \$100k

The DEPARTMENT OF EMERGENCY MANAGEMENT – ECD has submitted a request for a Personal Services Contract (PSC) 44337 - 14/15 for \$200,000 for Initial Request services for the period 01/15/2015 – 12/31/2017. 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/dhr Drupal/node/4039> 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)

Website and Grants Management

1B. Explain why this service is necessary and the consequences of denial.

The UASI Region is comprised of twelve counties and three core cities, which together receive federal funding to combat and respond to terrorism and related catastrophic disasters throughout the entire Bay Area. As a regional program, all jurisdictions must be able to easily communicate and access information from our website. This information can include, but is not limited to: meeting notices, minutes, program updates, compliance bulletins, and other resources to be used across jurisdictions and by the public at large. Consequences of denial would leave the region without a usable website for communicating important information. This in turn may hinder the Bay Area UASI Region's ability to develop future funding requests and secure increased funding for SF and all of the Bay Area cities and counties, thus jeopardizing our ability to prevent, protect against, respond to and recover from acts of terrorism and other man-made or natural catastrophes in the Bay Area.

5B. Will the contractor train City and county employee?

Contractor will train UASI staff on the use of the website and grants management system (4 hours total).

8600 Emergency Services Coordinator

1823 Senior Administrative Analyst

44 CFR 13.36 - Procurement.

Code of Federal Regulations - Title 44: Emergency Management and Assistance

Updated to: October 01, 2010

Linked as: <http://cfr.vlex.com>

-
-
-

Text

Title 44: Emergency Management and Assistance

CHAPTER I: FEDERAL EMERGENCY MANAGEMENT AGENCY, DEPARTMENT OF HOMELAND SECURITY

SUBCHAPTER A: GENERAL

PART 13: UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENTS TO STATE AND LOCAL GOVERNMENTS

Subpart C: Post-Award Requirements

: Changes, Property, and Subawards

13.36 - Procurement.

(a) States. When procuring property and services under a grant, a State will follow the same policies and procedures it uses for procurements from its non-Federal funds. The State will ensure that every purchase order or other contract includes any clauses required by Federal statutes and executive orders and their implementing regulations. Other grantees and subgrantees will follow paragraphs (b) through (i) in this section.

(b) Procurement standards. (1) Grantees and subgrantees will use their own procurement procedures which reflect applicable State and local laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in this section.

(2) Grantees and subgrantees will maintain a contract administration system which ensures that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

(3) Grantees and subgrantees will maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. No employee, officer or agent of the grantee or subgrantee shall participate in selection, or in the award or administration of a contract supported by Federal funds if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when:

(i) The employee, officer or agent,

(ii) Any member of his immediate family,

(iii) His or her partner, or

(iv) An organization which employs, or is about to employ, any of the above, has a financial or other interest in the firm selected for award. The grantee's or subgrantee's officers, employees or agents will neither solicit nor accept gratuities, favors or anything of monetary value from contractors, potential contractors, or parties to subagreements. Grantee and subgrantees may set minimum rules where the financial interest is not substantial or the gift is an unsolicited item of nominal intrinsic value. To the extent permitted by State or local law or regulations, such standards or conduct will provide for penalties, sanctions, or other disciplinary actions for violations of such standards by the grantee's and subgrantee's officers, employees, or agents, or by contractors or their agents. The awarding agency may in regulation provide additional prohibitions relative to real, apparent, or potential conflicts of interest.

(4) Grantee and subgrantee procedures will provide for a review of proposed procurements to avoid purchase of unnecessary or duplicative items. Consideration should be given to consolidating or breaking out procurements to obtain a more economical purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.

(5) To foster greater economy and efficiency, grantees and subgrantees are encouraged to enter into State and local intergovernmental agreements for procurement or use of common goods and services.

(6) Grantees and subgrantees are encouraged to use Federal excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs.

(7) Grantees and subgrantees are encouraged to use value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. Value engineering is a systematic and creative analysis of each contract item or task to ensure that its essential function is provided at the overall lower cost.

(8) Grantees and subgrantees will make awards only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public

policy, record of past performance, and financial and technical resources.

(9) Grantees and subgrantees will maintain records sufficient to detail the significant history of a procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.

(10) Grantees and subgrantees will use time and material type contracts only?

(i) After a determination that no other contract is suitable, and

(ii) If the contract includes a ceiling price that the contractor exceeds at its own risk.

(11) Grantees and subgrantees alone will be responsible, in accordance with good administrative practice and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to source evaluation, protests, disputes, and claims. These standards do not relieve the grantee or subgrantee of any contractual responsibilities under its contracts. Federal agencies will not substitute their judgment for that of the grantee or subgrantee unless the matter is primarily a Federal concern. Violations of law will be referred to the local, State, or Federal authority having proper jurisdiction.

(12) Grantees and subgrantees will have protest procedures to handle and resolve disputes relating to their procurements and shall in all instances disclose information regarding the protest to the awarding agency. A protestor must exhaust all administrative remedies with the grantee and subgrantee before pursuing a protest with the Federal agency. Reviews of protests by the Federal agency will be limited to:

(i) Violations of Federal law or regulations and the standards of this section (violations of State or local law will be under the jurisdiction of State or local authorities) and

(ii) Violations of the grantee's or subgrantee's protest procedures for failure to review a complaint or protest. Protests received by the Federal agency other than those specified above will be referred to the grantee or subgrantee.

(c) Competition. (1) All procurement transactions will be conducted in a manner providing full and open competition consistent with the standards of section 13.36. Some of the situations considered to be restrictive of competition include but are not limited to:

(i) Placing unreasonable requirements on firms in order for them to qualify to do business,

(ii) Requiring unnecessary experience and excessive bonding,

(iii) Noncompetitive pricing practices between firms or between affiliated companies,

(iv) Noncompetitive awards to consultants that are on retainer contracts,

(v) Organizational conflicts of interest,

(vi) Specifying only a "brand name" product instead of allowing "an equal" product to be offered and describing the performance of other relevant requirements of the procurement, and

(vii) Any arbitrary action in the procurement process.

(2) Grantees and subgrantees will conduct procurements in a manner that prohibits the use of statutorily or administratively imposed in-State or local geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographic preference. Nothing in this section preempts State licensing laws. When contracting for architectural and engineering (A/E) services, geographic location may be a selection criteria provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

(3) Grantees will have written selection procedures for procurement transactions. These procedures will ensure that all solicitations:

(i) Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description shall not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured, and when necessary, shall set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equal" description may be used as a means to define the performance or other salient requirements of a procurement. The specific features of the named brand which must be met by offerors shall be clearly stated; and

(ii) Identify all requirements which the offerors must fulfill and all other factors to be used in evaluating bids or proposals.

(4) Grantees and subgrantees will ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, grantees and subgrantees will not preclude potential bidders from qualifying during the solicitation period.

(d) Methods of procurement to be followed?
(1) Procurement by small purchase procedures. Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the simplified acquisition threshold fixed at 41 U.S.C. 403(11) (currently set at \$100,000). If small purchase procedures are used, price or rate quotations shall be obtained from an adequate number of qualified sources.

(2) Procurement by sealed bids (formal advertising). Bids are publicly solicited and a firm-fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid,

conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bid method is the preferred method for procuring construction, if the conditions in ? 13.36(d)(2)(i) apply.

(i) In order for sealed bidding to be feasible, the following conditions should be present:

(A) A complete, adequate, and realistic specification or purchase description is available;

(B) Two or more responsible bidders are willing and able to compete effectively and for the business; and

(C) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

(ii) If sealed bids are used, the following requirements apply:

(A) The invitation for bids will be publicly advertised and bids shall be solicited from an adequate number of known suppliers, providing them sufficient time prior to the date set for opening the bids;

(B) The invitation for bids, which will include any specifications and pertinent attachments, shall define the items or services in order for the bidder to properly respond;

(C) All bids will be publicly opened at the time and place prescribed in the invitation for bids;

(D) A firm fixed-price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs shall be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and

(E) Any or all bids may be rejected if there is a sound documented reason.

(3) Procurement by competitive proposals. The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed-price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. If this method is used, the following requirements apply:

(i) Requests for proposals will be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals shall be honored to the maximum extent practical;

(ii) Proposals will be solicited from an adequate number of qualified sources;

(iii) Grantees and subgrantees will have a method for conducting technical evaluations of the proposals received and for selecting awardees;

(iv) Awards will be made to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and

(v) Grantees and subgrantees may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services though A/E firms are a potential source to perform the proposed effort.

(4) Procurement by noncompetitive proposals is procurement through solicitation of a proposal from only one source, or after solicitation of a number of sources, competition is determined inadequate.

(i) Procurement by noncompetitive proposals may be used only when the award of a contract is infeasible under small purchase procedures, sealed bids or competitive proposals and one of the following circumstances applies:

(A) The item is available only from a single source;

(B) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;

(C) The awarding agency authorizes noncompetitive proposals; or

(D) After solicitation of a number of sources, competition is determined inadequate.

(ii) Cost analysis, i.e., verifying the proposed cost data, the projections of the data, and the evaluation of the specific elements of costs and profits, is required.

(iii) Grantees and subgrantees may be required to submit the proposed procurement to the awarding agency for pre-award review in accordance with paragraph (g) of this section.

(e) Contracting with small and minority firms, women's business enterprise and labor surplus area firms. (1) The grantee and subgrantee will take all necessary affirmative steps to assure that minority firms, women's business enterprises, and labor surplus area firms are used when possible.

(2) Affirmative steps shall include:

(i) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(ii) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(iii) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;

(iv) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women's business enterprises;

(v) Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce; and

(vi) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (e)(2) (i) through (v) of this section.

(f) Contract cost and price. (1) Grantees and subgrantees must perform a cost or price analysis in connection with every procurement action including contract modifications. The method and degree of analysis is dependent on the facts surrounding the particular procurement situation, but as a starting point, grantees must make independent estimates before receiving bids or proposals. A cost analysis must be performed when the offeror is required to submit the elements of his estimated cost, e.g., under professional, consulting, and architectural engineering services contracts. A cost analysis will be necessary when adequate price competition is lacking, and for sole source procurements, including contract modifications or change orders, unless price reasonableness can be established on the basis of a catalog or market price of a commercial product sold in substantial quantities to the general public or based on prices set by law or regulation. A price analysis will be used in all other instances to determine the reasonableness of the proposed contract price.

(2) Grantees and subgrantees will negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration will be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

(3) Costs or prices based on estimated costs for contracts under grants will be allowable only to the extent that costs incurred or cost estimates included in negotiated prices are consistent with Federal cost principles (see ? 13.22). Grantees may reference their own cost principles that comply with the applicable Federal cost principles.

(4) The cost plus a percentage of cost and percentage of construction cost methods of contracting shall not be used.

(g) Awarding agency review. (1) Grantees and subgrantees must make available, upon request of the awarding agency, technical specifications on proposed procurements where the awarding agency believes such review is needed to ensure that the item and/or service specified is the one being proposed for purchase. This review generally will take place prior to the time the

specification is incorporated into a solicitation document. However, if the grantee or subgrantee desires to have the review accomplished after a solicitation has been developed, the awarding agency may still review the specifications, with such review usually limited to the technical aspects of the proposed purchase.

(2) Grantees and subgrantees must on request make available for awarding agency pre-award review procurement documents, such as requests for proposals or invitations for bids, independent cost estimates, etc. when:

(i) A grantee's or subgrantee's procurement procedures or operation fails to comply with the procurement standards in this section; or

(ii) The procurement is expected to exceed the simplified acquisition threshold and is to be awarded without competition or only one bid or offer is received in response to a solicitation; or

(iii) The procurement, which is expected to exceed the simplified acquisition threshold, specifies a brand name product; or

(iv) The proposed award is more than the simplified acquisition threshold and is to be awarded to other than the apparent low bidder under a sealed bid procurement; or

(v) A proposed contract modification changes the scope of a contract or increases the contract amount by more than the simplified acquisition threshold.

(3) A grantee or subgrantee will be exempt from the pre-award review in paragraph (g)(2) of this section if the awarding agency determines that its procurement systems comply with the standards of this section.

(i) A grantee or subgrantee may request that its procurement system be reviewed by the awarding agency to determine whether its system meets these standards in order for its system to be certified. Generally, these reviews shall occur where there is a continuous high-dollar funding, and third-party contracts are awarded on a regular basis.

(ii) A grantee or subgrantee may self-certify its procurement system. Such self-certification shall not limit the awarding agency's right to survey the system. Under a self-certification procedure, awarding agencies may wish to rely on written assurances from the grantee or subgrantee that it is complying with these standards. A grantee or subgrantee will cite specific procedures, regulations, standards, etc., as being in compliance with these requirements and have its system available for review.

(h) Bonding requirements. For construction or facility improvement contracts or subcontracts exceeding the simplified acquisition threshold, the awarding agency may accept the bonding policy and requirements of the grantee or subgrantee provided the awarding agency has made a determination that the awarding agency's interest is adequately protected. If such a determination has not been made, the minimum requirements shall be as follows:

(1) A bid guarantee from each bidder equivalent to five percent of the bid price. The "bid guarantee" shall consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of his bid, execute such contractual documents as may be required within the time specified.

(2) A performance bond on the part of the contractor for 100 percent of the contract price. A "performance bond" is one executed in connection with a contract to secure fulfillment of all the contractor's obligations under such contract.

(3) A payment bond on the part of the contractor for 100 percent of the contract price. A "payment bond" is one executed in connection with a contract to assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

(i) Contract provisions. A grantee's and subgrantee's contracts must contain provisions in paragraph (i) of this section. Federal agencies are permitted to require changes, remedies, changed conditions, access and records retention, suspension of work, and other clauses approved by the Office of Federal Procurement Policy.

(1) Administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as may be appropriate. (Contracts more than the simplified acquisition threshold)

(2) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

(3) Compliance with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor regulations (41 CFR chapter 60). (All construction contracts awarded in excess of \$10,000 by grantees and their contractors or subgrantees)

(4) Compliance with the Copeland "Anti-Kickback" Act (18 U.S.C. 874) as supplemented in Department of Labor regulations (29 CFR Part 3). (All contracts and subgrants for construction or repair)

(5) Compliance with the Davis-Bacon Act (40 U.S.C. 276a to 276a-7) as supplemented by Department of Labor regulations (29 CFR part 5). (Construction contracts in excess of \$2000 awarded by grantees and subgrantees when required by Federal grant program legislation)

(6) Compliance with Sections 103 and 107 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-330) as supplemented by Department of Labor regulations (29 CFR Part 5). (Construction contracts awarded by grantees and subgrantees in excess of \$2000, and in excess of \$2500 for other contracts which involve the employment of mechanics or laborers)

(7) Notice of awarding agency requirements and regulations pertaining to reporting.

(8) Notice of awarding agency requirements and regulations pertaining to patent rights with respect to any discovery or invention which arises or is developed in the course of or under such contract.

(9) Awarding agency requirements and regulations pertaining to copyrights and rights in data.

(10) Access by the grantee, the subgrantee, the Federal grantor agency, the Comptroller General of the United States, or any of their duly authorized representatives to any books, documents, papers, and records of the contractor which are directly pertinent to that specific contract for the purpose of making audit, examination, excerpts, and transcriptions.

(11) Retention of all required records for three years after grantees or subgrantees make final payments and all other pending matters are closed.

(12) Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of \$100,000)

(13) Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).

[53 FR 8078, 8087, Mar. 11, 1988, as amended at 60 FR 19639, 19645, Apr. 19, 1995]

Sponsored links

This document cites

- U.S. Code - Title 18: Crimes and Criminal Procedure - 18 USC 874 - Sec. 874. Kickbacks from public works employees
 - US Code - Title 33: Navigation and Navigable Waters - 33 USC 1368 - Sec. 1368. Federal procurement
 - US Code - Title 41: Public Contracts - 41 USC 403 - Sec. 403. Definitions
-

See other documents that cite the same legislation

Related documents

-
- [more results about "44 cfr part 13.36" in vLex United States](#)
 - [more results about "44 cfr part 13.36" in Todo vLex](#)

Related searches

- [Procure](#)
- [electronic government procurement](#)
- [preferential procurement](#)
- [Procuration](#)
- [procuracion definition](#)
- [procuracion fee](#)
- [procuracion in english](#)

PERSONAL SERVICES CONTRACT SUMMARY

DATE: May 10, 2012

DEPARTMENT NAME: Emergency Management

DEPARTMENT NUMBER 77

TYPE OF APPROVAL: EXPEDITED REGULAR (OMIT POSTING _____)
 CONTINUING ANNUAL

TYPE OF REQUEST: INITIAL REQUEST MODIFICATION (PSC# _____)

TYPE OF SERVICE: Professional Services for Website Design and Development

FUNDING SOURCE: Homeland Security Grant Funding - Urban Areas Security Initiative

PSC AMOUNT: \$49,500 PSC DURATION: 06/01/2012-11/14/2014

1. DESCRIPTION OF WORK

A. Concise description of proposed work: The Bay Area UASI (BAUASI) seeks web design and development services to support the execution of a new website to be used by the Management Team to better support and promote the UASI program and its regional projects.

B. Explain why this service is necessary and the consequences of denial: In order to comply with the Brown Act, the BAUASI is required to post meeting documents to promote transparency. As a regional program, various jurisdictions need to be able to navigate the website to obtain posted documents. However, our current website is difficult to navigate and maintain. A new website would allow us to better communicate the image of the BAUASI to a wide audience, comply with the Brown Act, make documents readily accessible to the public, and serve an unmet communications need. Consequences of denial would leave us without a usable website for posting agendas, minutes, and program updates to make documents accessible to the public.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number): Not applicable.

D. Will the contract(s) be renewed: Yes, for maintenance (hosting and support services) only.

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

Local 21 [Signature] 5/11/12
Union Name Signature of person mailing/faxing form Date

Union Name Signature of person mailing/faxing form Date

RFP sent to _____, on _____
Union Name Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 3100-11/12

Approval Date: 5/17/12

Received 5/11/12
MK

[Signature]
FOR Micki Callahan, Human Resources Director

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

- A. Specify required skills and/or expertise: Website design and development; Implementation of hosting and maintenance of website
- B. Which, if any, civil service class normally performs this work?
5330 Graphics Supervisor
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: No.

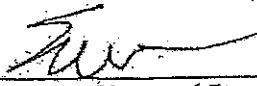
4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

- A. Explain why civil service classes are not applicable: The project lead reached out to DTIS to evaluate if services could be used within the City, however DTIS does not have the capabilities to meet the Scope of Work and Deliverables required for this project.
- B. Would it be practical to adopt a new civil service class to perform this work? Explain. No. The timeframe of this project is temporary and as such only requires specific services to produce an end product (a website).

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

- | | Yes | No |
|--|--------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employees? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employees? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <ul style="list-style-type: none"> • Describe the training and indicate approximate number of hours. • Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained. | | |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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



Signature of Departmental Personal Services Contract Coordinator

William Lee	(415) 705-8507
Print or Type Name	Telephone Number

Department of Emergency
Management

Division of Emergency Services

1011 Turk Street
San Francisco, CA 94102

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY – MTA Dept. Code: MTA

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

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

Type of Service: Financial Advisory Services (as-needed pool)

Funding Source: Operating Funds or bond proceeds PSC Duration: 5 years 1 day
PSC Amount: \$2,000,000 PSC Est. Start Date: 01/13/2015 PSC Est. End Date: 01/13/2020

1. Description of Work

A. Scope of Work:

The contractor(s) will provide financial planning, debt management, financial analysis and other financial services on an as-needed basis including, but not limited to, the following:

- *Review and update the SFMTA's financial plan for future financing transactions after a thorough review and analyses of the existing financial resources, cash flows, bond indebtedness and legal structure of the SFMTA.
*Provide as-needed financial advice regarding market conditions and trends, financial products, credit and credit analysis, third party alternative financing and special facility financing.
*Review and evaluate financing options, financial feasibility studies, legal documents, and structure and pricing of any financing and any escrow.
*Participate in credit rating agency presentations and preparation of official statements.
*Assist with the selection of underwriters, escrow agent, verification agent, trustee and any other members required for a financing team.
*Participate in preparing or providing financial analyses for projects and for the preparation of grant proposals.

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

This service is necessary for the SFMTA to obtain expert financial analysis and advice in specialized areas from professionals who focus on these types of services. Other City departments, including the Controller's Office of Public Finance, also contract with outside professionals for these types of services. Denial of these services would make it extremely difficult to undertake financial programs such as bond financings and to obtain assistance with financial analysis for important transportation projects.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
These services have been provided in the past via PSC #4060-09/10.

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

2. Union Notification: On 10/14/2014, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21, Municipal Executive Association;

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43826 - 14/15

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 12/15/2014

Civil Service Commission Action:

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
 Extensive and specialized knowledge, experience and expertise in financial modeling, debt service management, bond issuance and bond markets, bond ratings, private/public partnership arrangements and various types of financial analysis. The contractor(s) will be chosen from the list of pre-qualified firms offering financial advisory services created by the City Controller's office.

B. Which, if any, civil service class(es) normally perform(s) this work?
 1824,9182,9187,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Civil Service classifications cannot perform the scope of services that relies on the contractor's specialized expertise in financial modeling, debt service management and bond issuance and bond markets and ratings, as well as other specialized financial skills.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
 No. These services are required only on an as-needed basis.

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

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

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 10/14/2014 BY:

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

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

Receipt of Union Notification(s)

Hamada, Cynthia

From: dhr-psccordinator@sfgov.org on behalf of cynthia.hamada@sfmta.com
Sent: Tuesday, October 14, 2014 5:34 PM
To: Hamada, Cynthia; L21PSCReview@ifpte21.org; camaguey@sfmea.com; staff@sfmea.com; Hamada, Cynthia; Isen, Richard; DHR-PSCCoordinator, DHR
Subject: Receipt of Notice for new PCS over \$100K PSC # 43826 - 14/15
Categories: Green Category

RECEIPT for Union Notification for PSC 43826 - 14/15 more than \$100k

The MUNICIPAL TRANSPORTATION AGENCY – MTA has submitted a request for a Personal Services Contract (PSC) 43826 - 14/15 for \$2,000,000 for Initial Request services for the period 01/13/2015 – 01/13/2020. 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/dhr Drupal/node/4066> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again, change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PSC 43826-14/15

For all PSCs if the duration requested is 5 years or more, an explanation is required- historical PSC required:

It is important that these advisors gain an understanding of the SFMTA's financial position and needs, which is time-consuming and expensive. It is in the SFMTA's best interests to have the advisors under contract for five years so that they can use this developed expertise to assist the SFMTA and so that the SFMTA does not have to continually start from the beginning with new advisors.

MUNICIPAL TRANSPORTATION AGENCY
BOARD OF DIRECTORS
CITY AND COUNTY OF SAN FRANCISCO

RESOLUTION No. 09-162

WHEREAS, Developing a long-term Financial Plan is vital to the stability of the SFMTA to ensure funding for major capital projects and maintaining the highest levels of service to the public; and

WHEREAS, On December 2, 2008, the SFMTA Board of Directors adopted Resolution No. 08-197 authorizing the Executive Director/CEO to issue a Request for Proposals (RFP) for as-needed financial advisory services; and

WHEREAS, On January 30, 2009, seven proposals were received in response to the RFP and all were deemed non-responsive for failure to demonstrate compliance with the Human Rights Commission Good Faith Effort requirements in establishing the 20% Local Business Enterprise sub-contracting goal; and

WHEREAS, Staff reissued the RFP on March 20, 2009 and provided specific clarification on items of non-compliance and assistance with producing the required Good Faith Effort documentation; and

WHEREAS, Six proposals were received on April 17, 2009; and

WHEREAS, A selection committee consisting of representatives from the SFMTA, the Port of San Francisco, San Francisco International Airport and the City's Tax Collector's Office scored the six written proposals in accordance with the criteria outlined in the RFP; and

WHEREAS, The top three firms were interviewed by the selection committee which determined final scores and ranked the three within the pool of financial advisors; now, therefore, be it

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the SFMTA Executive Director/CEO to execute Contract #2008/09-38A, #2008/09-38B and #2008/09-38C, Agreements between the City and County of San Francisco and Backstrom McCarley Berry & Co., LLC, Ross Financial and The PFM Group respectively to provide as-needed financial advisory services for terms not to exceed five years each and an amount not to exceed \$2,000,000.00, for each contract, excluding bond issuance fees paid for with bond proceeds.

I certify that the foregoing resolution was adopted by the San Francisco Municipal Transportation Agency Board of Directors at its meeting of SEP 15 2009

R. Boomer

Secretary to the Board of Directors
San Francisco Municipal Transportation Agency



CIVIL SERVICE COMMISSION
CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR.

4060-09/10
F 6/11
MAY 12 11:49

MORGAN R. GORROND
PRESIDENT

December 9, 2009

E. DENNIS NORMANDY
VICE PRESIDENT

NOTICE OF CIVIL SERVICE COMMISSION ACTION

JOY Y. BOATWRIGHT
COMMISSIONER

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED
PERSONAL SERVICES CONTRACT NUMBER 4060-09/10.

DONALD A. CASPER
COMMISSIONER

At its meeting of December 7, 2009 the Civil Service Commission had for its consideration the above matter.

MARY Y. JUNG
COMMISSIONER

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

ANITA SANCHEZ
EXECUTIVE OFFICER

It was the decision of the Commission to approve request for proposed personal services contract #4060-09/10. Notify the offices of the Controller and the Office of Contract Administration.

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

CIVIL SERVICE COMMISSION

ANITA SANCHEZ
Executive Officer

Attachment

- cc: Parveen Boparai, Municipal Transportation Agency
- Micki Callahan, Human Resources Director
- Jessica Huey, Department of Human Resources
- Jennifer Johnston, Department of Human Resources
- Naomi Kelly, Office of Contract Administration
- Mary Ng, Department of Human Resources
- Ben Rosenfield, Controller
- Commission File
- Chron

POSTING FOR
November 18, 2009

PROPOSED PERSONAL SERVICES CONTRACTS

PSC No.	Digit/10	Department	Approval Type	Contract Amount	Description of Work	Duration
4080-08/10	35	SF Municipal Transportation Agency	Regular	\$ 8,000,000	Provide financial advisory services on an as-needed basis. MTA intends to select a pool of consultants to assist with developing a long-term financial plan to ensure funding for major capital projects. Services include financial planning, debt management, project analysis, financing document development, bond marketing, and related services.	01-Nov-14
4082-08/10	28	Mayor's Office of Housing	Regular	\$ 375,000	Provide lead risk assessment and analysis of privately owned single family homes and tenant occupied multi-family properties. Services also include collecting dust wipes, conducting XRF and soil sample evaluations in accordance with HUD and other Federal guidelines.	30-Jun-13
4083-08/10	26	Mayor's Office of Housing	Regular	\$ 300,000	Perform project monitoring for lead hazard reduction and tenant work of participating properties that include privately owned single family homes and tenant occupied multi-family properties. Services include verifying contractor compliance with City and State regulations, conducting clearance inspections in accordance with HUD & Federal guidelines; submit assessment and analytical reports to MOH.	30-Jun-13

*

PERSONAL SERVICES CONTRACT SUMMARY

ATE: October 20, 2009

DEPARTMENT NAME: San Francisco Municipal Transportation Agency DEPARTMENT NUMBER: 35

TYPE OF APPROVAL: () EXPEDITED (X) REGULAR (OMIT POSTING _____)

() CONTINUING () ANNUAL

TYPE OF REQUEST: (X) INITIAL REQUEST () MODIFICATION (PSC# _____)

TYPE OF SERVICE: Financial Advisory Services (as-needed pool)

FUNDING SOURCE: Operating Budget and/or Bond Proceeds

PSC AMOUNT: \$6,000,000.00

PSC DURATION: 11/2/09 – 11/1/2014

1. DESCRIPTION OF WORK

A. Concise description of proposed work: The Contractor will provide the following services:

- A. Financial Planning Services – continued on next page
- B. Debt Management Services – continued on next page
- C. Project Analysis – continued on next page

Continue A.

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

Developing a long-term Financial Plan is vital to the stability of the SFMTA to ensure funding for major capital projects and maintaining the highest levels of service to the public. The SFMTA was granted the authority to issue debt, for the first time, through the passage of Proposition A in November 2007.

The SFMTA has various major capital projects such as Central Subway, Transit Oriented Developments, Geary and Van Ness Avenue Bus Rapid Transit Projects, future system overhauls and long-term maintenance. The Federal Transit Administration grant funding (over \$900M) for the Central Subway Project looks to the SFMTA to have a financial contingency plan.

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

Previous financial advisory services were obtained through the Mayor's Office of Public Finance Financial Advisory Pool.

D. Will the contract(s) be renewed:

Not known at this time.

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

<u>IFPTE Local 21</u>	<u>Farween Boparai</u>	<u>10-20-09</u>
Union Name	Signature of person mailing / faxing form	Date
<u>MEA</u>	<u>Farween Boparai</u>	<u>10-20-09</u>
Union Name	Signature of person mailing / faxing form	Date

RFP sent to: Ging Louie at Local 21 on October 6, 2009 Steven Lee
Union Name Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# _____

SFMTA approved

STAFF ANALYSIS/RECOMMENDATION:

10-20-09

CIVIL SERVICE COMMISSION ACTION:

Continue A. Concise description of proposed work.

A. FINANCIAL PLANNING SERVICES

1. FINANCIAL PLAN:

- (a) Contractor shall consult with SFMTA and City officials, bond counsel, disclosure counsel, underwriter, and rating agencies to develop a Financing Plan which will provide the most economical structure for any given financing. The Financing Plan shall include, but not be limited to, the following:
 - i. A thorough review and analysis of the existing financial resources, cash flows, and legal structure of the SFMTA, as well as all relevant data pertaining to the financing plan.
 - ii. A determination of the amount necessary to be issued.
 - iii. A determination of the structure, which will result in the SFMTA receiving the lowest possible borrowing, cost.
- (b) Contractor will provide guidance on the timing, structure and method of raising capital for proposed transactions in the financial plan.
- (c) Contractor will keep the SFMTA abreast of changing state and federal laws in connection with the SFMTA's financings and will be available to provide assistance and advice on any legislative issues impacting the SFMTA.

2. ANALYZE FUTURE DEBT CAPACITY:

- (a) Contractor will formulate financial models to help evaluate the viability of various financing strategies to provide the required level of funding over time.

3. IDENTIFY FINANCING ALTERNATIVES:

- (a) Contractor will develop objective financing plans incorporating a full range of financing alternatives including; pay-as-you-go, revenue bonds, lease financing or special district debt where appropriate.

B. DEBT MANAGEMENT SERVICES

1. MAINTAIN DEBT POSITION SUMMARY:

- (a) Following each sale of debt the Contractor will update and maintain schedules for the SFMTA's Outstanding Debt Summary including, but not limited to:
 - i. Updates reflecting outstanding debt
 - ii. Debt capacities
 - iii. Debt service schedules
 - iv. Ratings
 - v. Assessed values
 - vi. Authorized but unissued debt
 - vii. Contractor will maintain copies of all transcripts.

2. DEVELOP AND MONITOR FINANCING SCHEDULE

- (a) Contractor will prepare a bond sale calendar that clearly identifies the responsibilities of each participant in the transaction.
 - i. SFMTA will have sufficient time for review of all disclosure materials prior to final printing and distribution.
 - ii. Contractor will keep SFMTA staff informed about the progress of the financing and, if necessary, modify the schedule to meet changing circumstances.

3. ANALYZE DEBT STRUCTURE ALTERNATIVES:

- (a) Contractor will analyze the debt structure and provide a determination based on the following three elements:
 - i. Is the proposed amortization schedule well-coordinated with SFMTA's existing liabilities and cash flow;
 - ii. Are the resources pledged to debt redemption sufficient to meet coverage requirements or tax rate parameters; and,

- iii. Is the proposed maturity schedule designed to attract maximum interest from underwriters and potential investors in the current market.
- (b) Contractor will provide advice and assistance concerning debt covenants, pledge of revenues, flow of funds, and legal coverage requirements.
- (c) Contractor will utilize the information from policy review and development to formulate the issue structure and other terms under which the bonds are to be offered addressing the following key issues:
 - i. Maturity Schedule and Pattern of Debt Service-provide advice and assistance in planning debt issue, determining the principal amount of debt to be sold, and develop a maturity schedule for each bond issue.
 - ii. Call Features- Contractor will perform detailed analyses of different call features, analyzing the effects of shorter call dates, smaller call premiums or even non-callable bonds and the potential impact they may have on marketing the bonds and interest rates that would be attained.
 - iii. Credit Enhancement- Contractor will analyze the merits of obtaining credit enhancements for discussion with SFMTA staff.

4. DEVELOP FINANCING DOCUMENTS:

- (a) Contractor will assist in the preparation, review and adoption of all legal documents and for drafting, printing, and distributing all disclosure documents prior to the bond sale.
- (b) Contractor will coordinate with SFMTA officials, bond counsel, and other team members in the preparation, review and finalization of all bond document preparation activities including:
 - i. Arranging for debt sales advertising in trade journals and periodicals such as the Bond Buyer and making all necessary arrangements for each bond sale with the registrar and trustee.
 - ii. Coordinate the printing and delivery of securities and notify the purchaser of the date and place that payment will be made.

COORDINATE THE MARKETING OF BONDS:

- (a) To assist the SFMTA with the timing of proposed issues, Contractor will closely monitor all local, national and international developments and evaluate the potential impact of each event on a new issue of tax-exempt securities.
- (b) Contractor will assist the SFMTA in coordinating its offerings with those of other issuers. This effort is designed to focus underwriter interest in the SFMTA's transactions by separating them from other sales. The overall goal is to identify a market in which: interest rates are stable; the supply of tax-exempt securities is light; and there is significant demand from both institutional and retail investors.
- (c) Working closely with SFMTA staff and bond counsel, Contractor will be actively involved in the review and development of key disclosure materials required to effectively market the SFMTA's issues (including the necessary documents for electronic bidding, if appropriate). These disclosure materials include the preliminary official statement ("POS"), the final official statement ("OS"), and for competitively bid issues, the official bid form and the Notice of Sale.
- (d) For the SFMTA's offerings, Contractor will work closely with SFMTA staff and financing team members to ensure that the POS is in full compliance with SEC guidelines, and industry standards including the guidelines developed by GFOA and MSRB.
- (e) Assist with securing a line or letter of credit when necessary.

6. RATING AGENCY CONTACTS:

- (a) Contractor will develop a presentation and coordinate the introduction of SFMTA as a new issue to the three major rating agencies, Moody's Investors Service, Standard & Poor's Corporation and Fitch Ratings
- (b) Contractor will determine both credit strengths and weaknesses prior to any presentation of materials to rating analysts based on a clear understanding of the analytical methods utilized by Moody's Investors Service, Standard & Poor's Corporation and Fitch Ratings.
- (c) Contractor will recommend the rating firms to be used, if necessary, and prepare and present such information as is required to receive rating.

7. ASSIST WITH THE PRICING OF THE BONDS:

- (a) Contractor will provide the SFMTA with market information relating to comparable issues in the market, comparisons of takedown levels and important economic data releases.

- i. Contractor will provide aggressive and informed representation to prospective bidders on behalf of the SFMTA in the pricing of securities.
 - ii. Contractor will assist in the evaluation of competitive bids and actively monitor market conditions to effectively advise the SFMTA as to the most appropriate market timing for its security offerings.
- (b) Contractor will provide the SFMTA with a Final Pricing Report so that the SFMTA can evaluate the fairness of the pricing of the bonds.
- i. The Report will be a summary of the bond pricing, final pricing and debt service schedules, orders and allocation of bonds (for negotiated financings), review of market conditions, bond rating reviews, and related news articles.
 - ii. The report will serve as a measure of the fairness of the pricing terms, and also as a comprehensive reference to which the SFMTA may refer in the future.
8. ASSIST WITH PRECLOSING AND CLOSING:
- (a) Contractor will work with all parties involved with the closing to prepare a schedule of tasks to be completed prior to closing and identify the party responsible for completing the task. These tasks include completing the final official statement, preparing closing documents, arranging for the transfer of funds and the investment of funds.

C. PROJECT ANALYSIS

PROJECT ANALYSIS

- (a) Financial Advisor will provide the SFMTA with financial analytical support in the specific projects, including but not limited to the following types of projects:
- i. Transit Oriented Development
 - ii. Real Estate Development
 - iii. Land Purchase and Sales
 - iv. Property Build out
 - v. Leveraging of other SFMTA assets

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

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

The Financial Advisors are required to have extensive knowledge, experience and expertise in financial modeling, debt service management, bond issuance, bond market, bond ratings and private/public partnership arrangements.

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

While the following classifications could perform partial services they do not possess expertise in financial modeling, bond market, bond rating, and private/public partnership arrangements, 9182 Manager VIII, 9187 Deputy Director II, and 5186 Finance Manager.

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

No

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

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

Civil Service classes do not have the skill sets, tools and market knowledge to perform the work. Additionally, civil service classifications do not possess the appropriate level of skills and expertise to protect the agency from any liabilities in the event the figures and analysis are incorrect which could pose a risk to the agency.

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

No. These services are specialized and on an as-needed basis.

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

Yes No

- | | | |
|--|-----|-----|
| A. Will the contractor directly supervise City and County employees? | () | (X) |
| B. Will the contractor train City and County employees? | () | (X) |
| C. Are there legal mandates requiring the use of contractual services? | () | (X) |
| D. Are there federal or state grant requirements regarding the use of contractual services? | () | (X) |
| E. Has a board or commission determined that contracting is the most effective way to provide this service?
<i>The SFMTA Board of Director has approved Resolution No. 09-162 on September 15, 2009</i> | (X) | () |
| F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? | () | (X) |

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

Parveen Boparai

Signature of Departmental Personal Services Contract Coordinator

Parveen Boparai
Print or Type Name

415.701.5377
Telephone Number

San Francisco Municipal Transportation Agency

1 So. Van Ness, 7th Floor, S. F. CA 94103
Address

PERSONAL SERVICES CONTRACT SUMMARY

DATE: October 14, 2014

DEPARTMENT NAME: San Francisco Municipal Transportation Agency DEPARTMENT NUMBER: 68

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

TYPE OF REQUEST: (X) INITIAL REQUEST () MODIFICATION (PSC# _____)

TYPE OF SERVICE: Financial Advisory Services (as-needed pool)

FUNDING SOURCE: Operating Fund or bond proceeds

PSC AMOUNT: \$2,000,000.00 PSC DURATION: January 13, 2015 - January 13, 2020

1. DESCRIPTION OF WORK

A. Concise description of proposed work:

The contractor(s) will provide financial planning, debt management, financial analysis and other financial services on an as-needed basis including, but not limited to, the following:

- Review and update the SFMTA's financial plan for future financing transactions after a thorough review and analyses of the existing financial resources, cash flows, bond indebtedness and legal structure of the SFMTA.
- Provide as-needed financial advice regarding market conditions and trends, financial products, credit and credit analysis, third party alternative financing and special facility financing.
- Review and evaluate financing options, financial feasibility studies, legal documents, and structure and pricing of any financing and any escrow.
- Participate in credit rating agency presentations and preparation of official statements.
- Assist with the selection of underwriters, escrow agent, verification agent, trustee and any other members required for a financing team.
- Participate in preparing or providing financial analyses for projects and for the preparation of grant proposals.

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

This service is necessary for the SFMTA to obtain expert financial analysis and advice in specialized areas from professionals who focus on these types of services. Other City departments, including the Controller's Office of Public Finance, also contract with outside professionals for these types of services. Denial of these services would make it extremely difficult to undertake financial programs such as bond financings and to obtain assistance with financial analysis for important transportation projects.

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

These services have been provided in the past via PSC #4060-09/10.

D. Will the contract(s) be renewed:

Yes.

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

<u>IFPTE, Local 21</u>	<u>[Signature]</u>	<u>10/14/14</u>
Union Name	Signature of person mailing / faxing form	Date
<u>Municipal Executives' Association Misc.</u>	<u>[Signature]</u>	<u>10/14/14</u>
Union Name	Signature of person mailing / faxing form	Date

RFP sent to _____ on _____ Date _____ Signature _____

FOR DEPARTMENT OF HUMAN RESOURCES USE SFMTA approve

10/14/14 cmh

PSC# 43826-14/15

STAFF ANALYSIS/RECOMMENDATION:
CIVIL SERVICE COMMISSION ACTION:

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise:
 Extensive and specialized knowledge, experience and expertise in financial modeling, debt service management, bond issuance and bond markets, bond ratings, private/public partnership arrangements and various types of financial analysis. The contractor(s) will be chosen from the list of pre-qualified firms offering financial advisory services created by the City Controller's office.

B. Which, if any, civil service class normally performs this work?
 Civil services classes 1824 Principal Administrative Analyst, 9182 Manager VIII, MTA, and 9187 Deputy Director II, MTA can perform some of this work, but not at the required extensive level of expertise and specialization in financial modeling, bond market, bond rating, and private/public partnership arrangements.

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

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM


A. Explain why civil service classes are not applicable:
 Civil Service classifications cannot perform the scope of services that relies on the contractor's specialized expertise in financial modeling, debt service management and bond issuance and bond markets and ratings, as well as other specialized financial skills.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
 No. These services are required only on an as-needed basis.

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

	<u>Yes</u>	<u>No</u>
A. Will the contractor directly supervise City and County employees?	()	(X)
B. Will the contractor train City and County employees? - Describe training and indicate approximate number of hours. - Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate number to be trained.	()	(X)
C. Are there legal mandates requiring the use of contractual services?	()	(X)
D. Are there federal or state grant requirements regarding the use of contractual services?	()	(X)
E. Has a board or commission determined that contracting is the most effective way to provide this service?	()	(X)
F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?	()	(X)

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



 Signature of Departmental Personal Services Contract Coordinator
 Parveen Boparai

 Print or Type Name

 415-701-5377
 Telephone Number

 San Francisco Municipal Transportation Agency, Human Resources

 1 South Van Ness Avenue, 6th Floor, San Francisco, CA 94103

 Address

PERSONAL SERVICES CONTRACT SUMMARY

DATE: October 14, 2014

DEPARTMENT NAME: San Francisco Municipal Transportation Agency DEPARTMENT NUMBER: 68

TYPE OF APPROVAL: () EXPEDITED (X) REGULAR (OMIT POSTING _____)

() CONTINUING () ANNUAL

TYPE OF REQUEST: () INITIAL REQUEST (X) MODIFICATION (PSC# 4060-09/10)

TYPE OF SERVICE: Financial Advisory Services (as-needed pool)

FUNDING SOURCE: Operating Budget and/or Bond Proceeds

PSC ORIG AMOUNT: <u>\$6,000,000.00</u>	PSC ORIG DURATION: <u>November 2, 2009 – November 1, 2014</u>
PSC MOD AMOUNT: <u>\$ 0.00</u>	PSC MOD. DURATION: <u>November 2, 2014 – January 12, 2015</u>
PSC TOTAL AMOUNT: <u>\$6,000,000.00</u>	PSC TOTAL DURATION: <u>November 2, 2009 – January 12, 2015</u>

1. DESCRIPTION OF WORK

A. **Concise description of proposed work:** The Contractor will provide the following services:

- A. Financial Planning Services – continued on next page
- B. Debt Management Services – continued on next page
- C. Project Analysis – continued on next page

Continue A.

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

Developing a long-term Financial Plan is vital to the stability of the SFMTA to ensure funding for major capital projects and maintaining the highest levels of service to the public. The SFMTA was granted the authority to issue debt, for the first time, through the passage of Proposition A in November 2007. The SFMTA has various major capital projects such as Central Subway, Transit Oriented Developments, Geary and Van Ness Avenue Bus Rapid Transit Projects, future system overhauls and long-term maintenance. The Federal Transit Administration grant funding (over \$900M) for the Central Subway Project looks to the SFMTA to have a financial contingency plan.

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

Previous financial advisory services were obtained through the Mayor's Office of Public Finance Financial Advisory Pool.

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

Not known at this time.

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

<u>IFPTE, Local 21</u>	<u>[Signature]</u>	<u>10/14/14</u>
Union Name	Signature of person mailing / faxing form	Date
<u>Municipal Executives' Association Misc.</u>	<u>[Signature]</u>	<u>10/14/14</u>
Union Name	Signature of person mailing / faxing form	Date

RFP sent to: Ging Louie at Local 21, on October 6, 2009. Steven Lee
 Union Name Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# _____

STAFF ANALYSIS/RECOMMENDATION:

CIVIL SERVICE COMMISSION ACTION:

SFMTA Approved
10/14/14 cmh

Continue A. Concise description of proposed work.

FINANCIAL PLANNING SERVICES

1. FINANCIAL PLAN:
 - (a) Contractor shall consult with SFMTA and City officials, bond counsel, disclosure counsel, underwriter, and rating agencies to develop a Financing Plan which will provide the most economical structure for any given financing. The Financing Plan shall include, but not be limited to, the following:
 - i. A thorough review and analysis of the existing financial resources, cash flows, and legal structure of the SFMTA, as well as all relevant data pertaining to the financing plan.
 - ii. A determination of the amount necessary to be issued.
 - iii. A determination of the structure, which will result in the SFMTA receiving the lowest possible borrowing, cost.
 - (b) Contractor will provide guidance on the timing, structure and method of raising capital for proposed transactions in the financial plan.
 - (c) Contractor will keep the SFMTA abreast of changing state and federal laws in connection with the SFMTA's financings and will be available to provide assistance and advice on any legislative issues impacting the SFMTA.
2. ANALYZE FUTURE DEBT CAPACITY:
 - (a) Contractor will formulate financial models to help evaluate the viability of various financing strategies to provide the required level of funding over time.
3. IDENTIFY FINANCING ALTERNATIVES:
 - (a) Contractor will develop objective financing plans incorporating a full range of financing alternatives including; pay-as-you-go, revenue bonds, lease financing or special district debt where appropriate.

DEBT MANAGEMENT SERVICES

1. MAINTAIN DEBT POSITION SUMMARY:
 - (a) Following each sale of debt the Contractor will update and maintain schedules for the SFMTA's Outstanding Debt Summary including, but not limited to:
 - i. Updates reflecting outstanding debt
 - ii. Debt capacities
 - iii. Debt service schedules
 - iv. Ratings
 - v. Assessed values
 - vi. Authorized but unissued debt
 - vii. Contractor will maintain copies of all transcripts.
2. DEVELOP AND MONITOR FINANCING SCHEDULE
 - (a) Contractor will prepare a bond sale calendar that clearly identifies the responsibilities of each participant in the transaction.
 - i. SFMTA will have sufficient time for review of all disclosure materials prior to final printing and distribution.
 - ii. Contractor we will keep SFMTA staff informed about the progress of the financing and, if necessary, modify the schedule to meet changing circumstances.
3. ANALYZE DEBT STRUCTURE ALTERNATIVES:
 - (a) Contractor will analyze the debt structure and provide a determination based on the following three elements:
 - i. Is the proposed amortization schedule well-coordinated with SFMTA's existing liabilities and cash flow;
 - ii. Are the resources pledged to debt redemption sufficient to meet coverage requirements or tax rate parameters; and,

- iii. Is the proposed maturity schedule designed to attract maximum interest from underwriters and potential investors in the current market.
- (b) Contractor will provide advice and assistance concerning debt covenants, pledge of revenues, flow of funds, and legal coverage requirements.
- (c) Contractor will utilize the information from policy review and development to formulate the issue structure and other terms under which the bonds are to be offered addressing the following key issues:
 - i. Maturity Schedule and Pattern of Debt Service-provide advice and assistance in planning debt issue, determining the principal amount of debt to be sold, and develop a maturity schedule for each bond issue.
 - ii. Call Features- Contractor will perform detailed analyses of different call features, analyzing the effects of shorter call dates, smaller call premiums or even non-callable bonds and the potential impact they may have on marketing the bonds and interest rates that would be attained.
 - iii. Credit Enhancement- Contractor will analyze the merits of obtaining credit enhancements for discussion with SFMTA staff.

4. DEVELOP FINANCING DOCUMENTS:

- (a) Contractor will assist in the preparation, review and adoption of all legal documents and for drafting, printing, and distributing all disclosure documents prior to the bond sale.
- (b) Contractor will coordinate with SFMTA officials, bond counsel, and other team members in the preparation, review and finalization of all bond document preparation activities including:
 - i. Arranging for debt sales advertising in trade journals and periodicals such as the Bond Buyer and making all necessary arrangements for each bond sale with the registrar and trustee.
 - ii. Coordinate the printing and delivery of securities and notify the purchaser of the date and place that payment will be made.

5. COORDINATE THE MARKETING OF BONDS:

- (a) To assist the SFMTA with the timing of proposed issues, Contractor will closely monitor all local, national and international developments and evaluate the potential impact of each event on a new-issue of tax-exempt securities.
- (b) Contractor will assist the SFMTA in coordinating its offerings with those of other issuers. This effort is designed to focus underwriter interest in the SFMTA's transactions by separating them from other sales. The overall goal is to identify a market in which: interest rates are stable; the supply of tax-exempt securities is light; and there is significant demand from both institutional and retail investors.
- (c) Working closely with SFMTA staff and bond counsel, Contractor will be actively involved in the review and development of key disclosure materials required to effectively market the SFMTA's issues (including the necessary documents for electronic bidding, if appropriate). These disclosure materials include the preliminary official statement ("POS"), the final official statement ("OS"), and for competitively bid issues, the official bid form and the Notice of Sale.
- (d) For the SFMTA's offerings, Contractor will work closely with SFMTA staff and financing team members to ensure that the POS is in full compliance with SEC guidelines, and industry standards including the guidelines developed by GFOA and MSRB.
- (e) Assist with securing a line or letter of credit when necessary.

6. RATING AGENCY CONTACTS:

- (a) Contractor will develop a presentation and coordinate the introduction of SFMTA as a new issue to the three major rating agencies, Moody's Investors Service, Standard & Poor's Corporation and Fitch Ratings
- (b) Contractor will determine both credit strengths and weaknesses prior to any presentation of materials to rating analysts based on a clear understanding of the analytical methods utilized by Moody's Investors Service, Standard & Poor's Corporation and Fitch Ratings.
- (c) Contractor will recommend the rating firms to be used, if necessary, and prepare and present such information as is required to receive rating.

7. ASSIST WITH THE PRICING OF THE BONDS:

- (a) Contractor will provide the SFMTA with market information relating to comparable issues in the market, comparisons of takedown levels and important economic data releases.

- i. Contractor will provide aggressive and informed representation to prospective bidders on behalf of the SFMTA in the pricing of securities.
 - ii. Contractor will assist in the evaluation of competitive bids and actively monitor market conditions to effectively advise the SFMTA as to the most appropriate market timing for its security offerings.
- (b) Contractor will provide the SFMTA with a Final Pricing Report so that the SFMTA can evaluate the fairness of the pricing of the bonds.
- i. The Report will be a summary of the bond pricing, final pricing and debt service schedules, orders and allocation of bonds (for negotiated financings), review of market conditions, bond rating reviews, and related news articles.
 - ii. The report will serve as a measure of the fairness of the pricing terms, and also as a comprehensive reference to which the SFMTA may refer in the future.
8. ASSIST WITH PRECLOSING AND CLOSING:
- (a) Contractor will work with all parties involved with the closing to prepare a schedule of tasks to be completed prior to closing and identify the party responsible for completing the task. These tasks include completing the final official statement, preparing closing documents, arranging for the transfer of funds and the investment of funds.

C. PROJECT ANALYSIS

PROJECT ANALYSIS

- (a) Financial Advisor will provide the SFMTA with financial analytical support in the specific projects, including but not limited to the following types of projects:
- i. Transit Oriented Development
 - ii. Real Estate Development
 - iii. Land Purchase and Sales
 - iv. Property Build out
 - v. Leveraging of other SFMTA assets

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

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

The Financial Advisors are required to have extensive knowledge, experience and expertise in financial modeling, debt service management, bond issuance, bond market, bond ratings and private/public partnership arrangements.

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

While the following classifications could perform partial services they do not possess expertise in financial modeling, bond market, bond rating, and private/public partnership arrangements, 9182 Manager VIII, 9187 Deputy Director II, and 5186 Finance Manager.

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

No

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

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

Civil Service classes do not have the skill sets, tools and market knowledge to perform the work. Additionally, civil service classifications do not possess the appropriate level of skills and expertise to protect the agency from any liabilities in the event the figures and analysis are incorrect which could pose a risk to the agency.

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

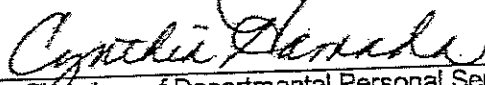
No. These services are specialized and on an as-needed basis.

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

Yes No

- A. Will the contractor directly supervise City and County employees? () (X)
- B. Will the contractor train City and County employees? () (X)
- C. Are there legal mandates requiring the use of contractual services? () (X)
- D. Are there federal or state grant requirements regarding the use of contractual services? () (X)
- E. Has a board or commission determined that contracting is the most effective way to provide this service?
The SFMTA Board of Director has approved Resolution No. 09-162 on September 15, 2009 (X) ()
- F. Will the proposed work be completed by a contractor that has a current personal services contract with your department?
Ross Financial, The PFM Group, and Backstrom McCarley Berry & Co., LLC. (X) ()

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


 Signature of Departmental Personal Services Contract Coordinator
 Parveen Boparai
 Print or Type Name
 415.701.5377
 Telephone Number
 San Francisco Municipal Transportation Agency
 1 South Van Ness Avenue, 6th Floor, San Francisco, CA 94103
 Address

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE -- POL Dept. Code: POL

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

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

Type of Service: Pre-Employment Psychological Screening Services

Funding Source: General Fund PSC Duration: 4 years
PSC Amount: \$600,000 PSC Est. Start Date: 07/01/2015 PSC Est. End Date: 06/30/2019

1. Description of Work

A. Scope of Work:

The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.

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

Pre-employment psychological evaluations of police officer candidates is required by section #1031(f) of the California Code of Regulations. Denial would prevent the San Francisco Police Department from hiring police officers.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
PSC 4139-07/08

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

2. Union Notification: On 09/23/2014, the Department notified the following employee organizations of this PSC/RFP request: Unrepresented Miscellaneous, Unrepresented Management, Transport Workers Union, L 200, Theatrical Stage Employee

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47260 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 12/15/2014

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Section #1031(f) of the California Code of Regulations requires a Ph.D. in Psychology with at least five (5) years of post-graduate experience in diagnosis and treatment of emotional and mental disorders.

B. Which, if any, civil service class(es) normally perform(s) this work?
2574,2576,

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain:
Yes, the vendor will be required to have specialized software used for psychological evaluation and tracking of police officer candidates.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

These services will be performed on an as-needed basis.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
No. Services will be performed on an as-needed basis.

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

YES NO

- A. Will the contractor directly supervise City and County employee?
- B. Will the contractor train City and County employee?
- C. Are there legal mandates requiring the use of contractual services?
- D. Are there federal or state grant requirements regarding the use of contractual services?
- E. Has a board or commission determined that contracting is the most effective way to provide this service?
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department?

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 11/17/2014 BY:

Name: Genie Wong Phone: (415) 553-1736 Email: Genie.Wong@sfgov.org

Address: 850 Bryant Street, #511 San Francisco, CA 94103

Receipt of Union Notification(s)

Receipt of Notice for new PCS over \$100K PSC # 47260 - 14/15
dhr-psccordinator@sfgov.org Genie.Wong@sfgov.org Wong, Genie (POL);
leah.berlanga@seiu1021.org; davidmkersten@gmail.com; ablood@cirseiu.org; Poon, SinYee
(HSA); david.canham@seiu1021.org; joe.tanner@seiu1021.net;
RECEIPT for Union Notification for PSC 47260 - 14/15 more than \$100k

The POLICE – POL has submitted a request for a Personal Services Contract
(PSC)
47260 - 14/15 for \$600,000 for Initial Request services for the period
07/01/2015 – 06/30/2019. 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/3883> 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

Receipt of Notice for new PCS over \$100K PSC # 47260 - 14/15

X DELETE ← REPLY ⇐ REPLY ALL → FORWARD ...



dhr-psccordinator@sfgov.org on behalf of Genie.Wong@sfg

Mark as unread

Tue 9/23/2014 10:57 AM

Inbox

Show all 26 recipients

To: Wong, Genie (POL); local200twu@sbcglobal.net; rmitchell@twusf.org; grojo@local39.org;
 sfsmsa@gmail.com; pkarinen@nccrc.org; jduniz@uapd.com; ...

Action Items

+ Get more apps

RECEIPT for Union Notification for PSC 47260 - 14/15 more than \$100k

The POLICE -- POL, has submitted a request for a Personal Services Contract (PSC) 47260 - 14/15 for \$600,000 for Initial Request services for the period 07/01/2015 -- 06/30/2019. 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/3883> 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)

California Government Code Section 1031

[Legal Research Home](#) > [California Laws](#) > [Government Code](#) > [California Government Code Section 1031](#)

1031. Each class of public officers or employees declared by law to be peace officers shall meet all of the following minimum standards:

(a) Be a citizen of the United States or a permanent resident alien who is eligible for and has applied for citizenship, except as provided in Section 2267 of the Vehicle Code.

(b) Be at least 18 years of age.

(c) Be fingerprinted for purposes of search of local, state, and national fingerprint files to disclose a criminal record.

(d) Be of good moral character, as determined by a thorough background investigation.

(e) Be a high school graduate, pass the General Education Development Test indicating high school graduation level, pass the California High School Proficiency Examination, or have attained a two-year, four-year, or advanced degree from an accredited college or university. The high school shall be either a United States public school, an accredited United States Department of Defense high school, or an accredited or approved public or nonpublic high school.

Any accreditation or approval required by this paragraph shall be from a state or local government educational agency using local or state government approved accreditation, licensing, registration, or other approval standards, a regional accrediting association, an

accrediting association recognized by the Secretary of the United States Department of Education, an accrediting association holding full membership in the National Council for Private School Accreditation (NCPSA), an organization holding full membership in the Commission on International and Trans-Regional Accreditation (CITA), an organization holding full membership in the Council for American Private Education (CAPE), or an accrediting association recognized by the National Federation of Nonpublic School State Accrediting Associations (NFNSSAA).

(f) Be found to be free from any physical, emotional, or mental condition that might adversely affect the exercise of the powers of a peace officer.

(1) Physical condition shall be evaluated by a licensed physician and surgeon.

(2) Emotional and mental condition shall be evaluated by either of the following:

(A) A physician and surgeon who holds a valid California license to practice medicine, has successfully completed a postgraduate medical residency education program in psychiatry accredited by the Accreditation Council for Graduate Medical Education, and has at least the equivalent of five full-time years of experience in the diagnosis and treatment of emotional and mental disorders, including the equivalent of three full-time years accrued after completion of the psychiatric residency program.

(B) A psychologist licensed by the California Board of Psychology

who has at least the equivalent of five full-time years of experience in the diagnosis and treatment of emotional and mental disorders, including the equivalent of three full-time years accrued postdoctorate.

The physician and surgeon or psychologist shall also have met any applicable education and training procedures set forth by the California Commission on Peace Officer Standards and Training designed for the conduct of preemployment psychological screening of peace officers.

(g) This section shall not be construed to preclude the adoption of additional or higher standards, including age.

(h) This section shall become operative on January 1, 2005.

Section: Previous 1027.5 1028 1028.1 1028.2 1029 1029.1 1030 1031 1031.1 1031.2 1031.5 1040 1041 1042 1043 Next

City and County of San Francisco

Request for Proposals for

Pre- Employment Psychological Screening Services



Date issued:
Proposal due:

JANUARY 30TH, 2008
5:00 p.m., March 3rd, 2008

Request for Proposals for Pre - Employment Psychological Screening Services

Table of Contents

	Page
I. Introduction and Schedule.....	[#1]
II. Scope of Work.....	[#2]
III. Submission Requirements.....	[#3-5]
IV. Evaluation and Selection Criteria.....	[#6-7]
V. Pre-proposal Conference and Contract Award.....	[#8]
VI. Terms and Conditions for Receipt of Proposals	[#9-13]
VII. City Contract Requirements	[#14-15]
VIII. Protest Procedures	[#16]

Appendices:

- A. HRC Attachment 2: Requirements for Architecture, Engineering and Professional Services Contracts, for contacts \$29,000 and over (separate document). Proposers must submit the following forms:

- Form 2A HRC Contract Participation form
- Form 3 HRC Non-discrimination Affidavit
- Form 4 Joint Venture Participation Schedule (if applicable)
- Form 5 HRC Employment form

If there are any questions regarding the HRC forms, please refer to Section VI, #3.

- B. Standard Forms: Listing and Internet addresses of Forms related to Taxpayer Identification Number and Certification, to Business Tax Declaration, and to Chapters 12B and 12C, and 14B of the S.F. Administrative Code. B-1
- C. Agreement for Professional Services (form P-500) – separate document

RFP for Pre – Employment Psychological Screening Services

I. Introduction and Schedule

A. General

It is the intention of the San Francisco Police Department to contract with a qualified firm to provide pre employment psychological screening services for the screening of applicants for the position of Police Officer, Police Reserve Officer, Police Cadet, and Police Service Aide. Screening will include written testing, and clinical face to face interviews. Information on group size and number of groups per year is based on past requirements and is intended as solicitation information only. No guarantee of actual service requirement is implied by this solicitation. Service requirement will be determined by actual need.

" The contract shall have an original term of 4 years. In addition, the City shall have 3 options to extend the term for a period of 1 years each, which the City may exercise in its sole, absolute discretion."

B. Schedule

The anticipated schedule for selecting a consultant is:

<u>Proposal Phase</u>	<u>Date</u>
RFP is issued by the City	January 30 th , 2008
Deadline for submission of written questions or requests for clarification	February 13 th , 2008
Proposals due	March 3 rd , 2008
Oral interview with firms selected for further consideration	Tentative week of March 10 th or March 17 th , 2008

RFP for Pre – Employment Psychological Screening Services

II. Scope of Work

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project.

The following are work tasks assumed necessary to Pre Employment Psychological Screening Services.

1. The Contractor will work closely with the San Francisco Police Department Background Unit in Pre Employment screening for the position of Police Officer, Police Reserve Officer, Police Cadet, and Police Service Aide. The Psychological Screening of Police Officer and Reserve Officer is mandated by California Government Code section # 1031.
2. The Contractor shall have a site available for the administration of the written tests, and clinical interviews of applicants. The San Francisco Police Department, at its option can administer tests and arrange for interviews at an SFPD site.
3. The Police Department has proctors available and may administer large scale testing. Contractors may, however submit responses that include the use of its own proctors. Proposal must include, who would proctor the tests and the cost for the service.
4. The Police Department will set dates for tests and interviews. The selected Contractor shall coordinate dates with the Department designee.
5. Test administration and evaluation must be completed before interviews are performed. Test results must be available for use in the interview process.
6. Test evaluation and clinical interviews must be conducted by licensed psychologists who meet the qualifications of California Government Code section #1031 (f).
7. Contractors must be capable of providing consultation and expert witness service, including but not limited to: hiring meetings, training, court, and Civil Service Commission testimony, on an as needed basis as requested by the San Francisco Police Department.
8. Information gathered from testing and interview process must be evaluated and integrated into psychological reports containing specific job related recommendations. Reports shall identify Psychological trait characteristics of each applicant, and state how these traits might affect the applicants performance as a Police Officer, Police Reserve Officer, Police Cadet, or Police Service Aide. The report shall provide a recommendation placing the applicant into an unambiguous suitability rating category reflecting the psychologists professional judgment concerning the applicants potential of meeting POST standards and becoming a successful officer.
9. All Psychological reports generated, shall become the property of the San Francisco Police Department. The information from testing and interviews shall be strictly confidential and shall be disclosed only to the specific City designee.

RFP for Pre – Employment Psychological Screening Services

III. Submission Requirements

A. Time and Place for Submission of Proposals

Proposals must be received by 5:00 p.m., on March 3rd, 2008. Postmarks will not be considered in judging the timeliness of submissions. Proposals may be delivered in person and left with or mailed to:

Officer Shawn Wallace # 1104
San Francisco Police Department
Legal Division, Room # 575
Hall of Justice
850 Bryant Street
San Francisco, CA 94103

Proposers shall submit 6 copies of the proposal and two copies, separately bound, of required HRC Forms in a sealed envelope clearly marked Pre Employment Psychological Screening Services to the above location. Proposals that are submitted by fax will not be accepted. Late submissions will not be considered.

B. Format

If your response is lengthy, please include a Table of Contents.

C. Content

Firms interested in responding to this RFP must submit the following information, in the order specified below:

1. Introduction and Executive Summary (up to [3] pages)

Submit a letter of introduction and executive summary of the proposal. The letter must be signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal.

2. Project Approach (unlimited)

Describe the services and activities that your firm proposes to provide to the City. Include the following information:

- a. Overall scope of work tasks; and
- b. Schedule and ability to complete the project within the City's required time frame; and
- c. Assignment of work within your firm's work team.

RFP for Pre – Employment Psychological Screening Services

- d. Written tests. 1.) A list of proposed test instruments including a description of the tests, the purpose of each and why they would be effective in screening Police Officer candidates. 2.) A statement detailing how the Police Department would coordinate with the contractor in setting up the testing, how far in advance test administration must be scheduled, how long the test will take and who would proctor the test. 3.) Describe written protocols and training provided to the Police Department staff to meet testing requirements if the Police Department proctors the test sessions.
- e. Interviews. 1.) A statement detailing how the clinical interview will be performed by the clinical psychologist. Include the minimum time the interview will take and what domains the interview will cover, (development history, personal life habits, work history) including actual questions. Will additional time be allowed if the psychologist deems it necessary? 2.) A description of how the interview will be evaluated by the psychologist to formulate a report and recommendation regarding the suitability of an applicant. 3.) A description of how the contractor would coordinate setting up test schedules with the Police Department.
- f. Reports and Recommendations. 1.) A detailed description of reports that will be provided to the Police Department. Detail how the reports will summarize major findings (ie., likelihood that the applicant will be successful as a Police Officer, potential performance problems, whether there are reasons to believe the applicant exhibits any psychological traits or characteristics that would interfere with the successful performance of essential job tasks.) 2.) Describe the proposed method of combining test, interview and behavioral data to place applicants into an unambiguous ranking category reflecting the psychologists' judgment concerning the applicants' potential of being a successful Police Officer. 3.) A statement of how long it will take to provide the psychological report to the Police Department following completion of a clinical interview. 4.) A description of the contractors methods for maintaining confidentiality of information obtained. Include any disclosure and release forms provided to candidates prior to testing.
- g. Optional Services: Describe availability and experience in providing consultation and expert witness service. These services shall be on an as needed basis, upon request by the Police Department. Services might include, but not limited to, hiring meetings, training, court, and or civil Service Commission testimony.

3. Firm Qualifications (unlimited)

Provide information on your firm's background and qualifications which addresses the following:

- a. Name, address, and telephone number of a contact person; and
- b. A brief description of your firm, as well as how any joint venture or association would be structured; and
- c. A description of not more than four projects similar in size and scope prepared by your firm including client, reference and telephone numbers, staff members who worked on each project, budget, schedule and project summary. Descriptions should be limited to one page for each project. If joint consultants or subconsultants are proposed provide the above information for each.

RFP for Pre – Employment Psychological Screening Services

- d. A statement of the firms experience and qualifications to meet the requirements of the Police Department as outlined herein including the names, titles, and telephone numbers of the current clients that are Law Enforcement agencies of similar size and responsibility to the San Francisco Police Department, and who can speak to the firms ability to perform accordingly.
- e. Statement of the firms direct experience in performing pre employment psychological screening of Police Officers.
- f. A description of the research and development, (example: longitudinal validity research) performed by the Contractor to ensure objective and defensible psychological pre screening evaluation.
- g. Qualifications of staff who would be assigned to this project. Provide titles and qualifications of staff that would be assigned to perform various services.

4. Team Qualifications (up to [5] pages)

a. Provide a list identifying: (1) each key person on the project team, (2) the project manager, (3) the role each will play in the project, and (4) a written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval.

b. Provide a description of the experience and qualifications of the project team members, including brief resumes if necessary.

5. References (4 pages)

Provide reference letters from 4 recent clients (preferably other public agencies).

6. Fee Proposal

The City intends to award this contract to the firm that it considers will provide the best overall program services. The City reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Please provide a fee proposal in a sealed envelope that includes the following:

- a. Total fee for each of the disciplines identified in the Scope of Work with a not-to-exceed figure; and
- b. Hourly rates for all team members. Hourly rates and itemized costs may be used to negotiate changes in the Scope of Work if necessary.

RFP for Pre – Employment Psychological Screening Services

IV. Evaluation and Selection Criteria

A. Minimum Qualifications

The following are the minimum requirements for each firm submitting a proposal. The firm must have staff psychologist(s) who are licensed and or certified by the state of California and who are trained and experienced in psychological test interpretation and psychological assessment techniques. At a minimum, the Contractor must possess:

- A.) Knowledge of the research literature related to the Pre Employment screening of Police personnel.
- B.) A working knowledge of Uniform Guidelines on Employee Selection procedures, (1978 or as amended), and associated fair employment issues.
- C.) A thorough knowledge of the behaviors and characteristics for success as an Officer. Contractor must be able to provide psychological assessment procedures that accurately and reliably assess candidates for psychological fitness to be a successful Police Officer.
- D.) Test Evaluation and clinical interviews must be conducted by licensed clinical psychologists, who meet all the requirements specified by the California Government Code section # 1031 (f).
- E.) The ability to relate effectively with San Francisco Police Department designees. Contractor should function as a team member working closely with Police Department personnel in the screening process. Contractor should be able to relate directly and comfortably with top level administrators, since the ultimate responsibility rests at that level.

Any proposal that does not demonstrate that the proposer meets these minimum requirements by the deadline for submittal of proposals will be considered non-responsive and will not be eligible for award of the contract.

B. Selection Criteria

The proposals will be evaluated by a selection committee comprised of parties with expertise in **Pre Employment Psychological Screening**. The City intends to evaluate the proposals generally in accordance with the criteria itemized below. Up to 3 of the firms with the highest scoring proposals will be interviewed by the committee to make the final selection. Points earned from the oral interview will be added to points earned on the written proposal to achieve a final ranking.

1. **Project Approach ([40] points)**
 - a. Understanding of the project and the tasks to be performed, etc.
 - b. Reasonableness of work schedule and fee proposal.
2. **Assigned Project Staff ([30] points)**
 - a. Recent experience of staff assigned to the project and a description of the tasks to be performed by each staff person; and
 - b. Professional qualifications and education; and
 - c. Workload, staff availability and accessibility.

RFP for Pre-employment Psychological Screening Services

3. Experience of Firm and Subconsultants ([30] points)

- a. Expertise of the firm and subconsultants in the fields necessary to complete the tasks; and
- b. Quality of recently completed projects, including adherence to schedules, deadlines and budgets; and
- c. Experience with similar projects; and results of reference letters

4. Oral Interview ([50] points)

Following the evaluation of the written proposals, the 3 proposers receiving the highest scores will be invited to an oral interview. The interview will consist of standard questions asked of each of the 3 proposers.

Oral Interview Evaluation Criteria

- 1.) Ability to describe the role that the vendor plays in the Pre employment Selection process for San Francisco Police Department applicants.
- 2.) Ability to reflect diversity in personnel.
- 3.) Experience in the area.
- 4.) Ability to meet SFPD hiring goals. A large number or small number, depending on budgetary concerns.
- 5.) Ability to work as a team member to accomplish the SFPD hiring goals.

V. Pre-proposal conference and Contract award

A. Pre-Proposal Conference

There will not be a pre proposal conference.

B. Contract Award

The **San Francisco Police Department** will select a proposer with whom **San Francisco Police Department** staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time the **San Francisco Police Department**, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin contract negotiations with the next highest ranked proposer.

VI. Terms and Conditions for Receipt of Proposals

A. Errors and Omissions in RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the Department, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the Department promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

B. Inquiries Regarding RFP

Inquiries regarding the RFP and all oral notifications of an intent to request written modification or clarification of the RFP, must be directed to:

Officer Shawn Wallace # 1104
E-Mail Address: SFPD.Contracts@SBCGLOBAL.NET

C. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

D. Change Notices

The Department may modify the RFP, prior to the proposal due date, by issuing Change Notices, which will be posted on the website. The proposer shall be responsible for ensuring that its proposal reflects any and all Change Notices issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the proposer consult the website frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Change Notices.

E. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

F. Revision of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.

RFP for Pre – Employment Psychological Screening Services

At any time during the proposal evaluation process, the Department may require a proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

G. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

H. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the City and may be used by the City in any way deemed appropriate.

I. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the proposer is prohibited from making contributions to:

- the officer's re-election campaign
- a candidate for that officer's office
- a committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

RFP for Pre – Employment Psychological Screening Services

1. Criminal. Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. Civil. Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. Administrative. Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

J. Sunshine Ordinance

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

K. Public Access to Meetings and Records

If a proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the proposer must comply with Chapter 12L. The proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to proposer's meetings and records, and (2) a summary of all complaints concerning the proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

L. Reservations of Rights by the City

The issuance of this RFP does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFP by any other means; or

RFP for Pre – Employment Psychological Screening Services

6. Determine that no project will be pursued.

M. No Waiver

No waiver by the City of any provision of this RFP shall be implied from any failure by the City to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

N. Local Business Enterprise Goals and Outreach

The requirements of the Local Business Enterprise and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code as it now exists or as it may be amended in the future (collectively the "LBE Ordinance") shall apply to this RFP.

1. LBE Subconsultant Participation Goals

The LBE subconsulting goal for this project is 0 % of the total value of the goods and/or services to be procured.

Each firm responding to this solicitation shall demonstrate in its response that it has used good-faith outreach to select LBE subcontractors as set forth in S.F. Administrative Code §§14B.8 and 14B.9, and shall identify the particular LBE subcontractors solicited and selected to be used in performing the contract. For each LBE identified as a subcontractor, the response must specify the value of the participation as a percentage of the total value of the goods and/or services to be procured, the type of work to be performed, and such information as may reasonably be required to determine the responsiveness of the proposal. LBEs identified as subcontractors must be certified with the San Francisco Human Rights Commission at the time the proposal is submitted, and must be contacted by the proposer (prime contractor) prior to listing them as subcontractors in the proposal. Any proposal that does not meet the requirements of this paragraph will be non-responsive.

In addition to demonstrating that it will achieve the level of subconsulting participation required by the contract, a proposer shall also undertake and document in its submittal the good faith efforts required by Chapter 14B.8(C)&(D) and HRC Attachment 2, Requirements for Architecture, Engineering and Professional Services Contracts.

Proposals which fail to comply with the material requirements of S.F. Administrative Code §§14B.8 and 14B.9, HRC Attachment 2 and this RFP will be deemed non-responsive and will be rejected. During the term of the contract, any failure to comply with the level of LBE subcontractor participation specified in the contract shall be deemed a material breach of contract. Subconsulting goals can only be met with HRC-certified LBEs located in San Francisco.

2. LBE Participation

The City strongly encourages proposals from qualified LBEs. Pursuant to Chapter 14B, the following rating discount will be in effect for the award of this project for any proposers who are certified by HRC as a LBE, or joint ventures where the joint venture partners are in the same discipline and have the specific levels of participation as identified below. Certification applications may be obtained by calling HRC at (415) 252-2500. The rating discount applies at each phase of the selection process. The application of the rating discount is as follows:

- a. A 10% discount to an LBE; or a joint venture between or among LBEs; or

RFP for Pre – Employment Psychological Screening Services

- b. A 5% discount to a joint venture with LBE participation that equals or exceeds 35%, but is under 40%; or
- c. A 7.5% discount to a joint venture with LBE participation that equals or exceeds 40%; or
- d. A 10% discount to a certified non-profit entity.

If applying for a rating discount as a joint venture: The LBE must be an active partner in the joint venture and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the joint venture. The portion of the LBE joint venture's work shall be set forth in detail separately from the work to be performed by the non-LBE joint venture partner. The LBE joint venture's portion of the contract must be assigned a commercially useful function.

3. HRC Forms to be Submitted with Proposal

a. All proposals submitted must include the following Human Rights Commission (HRC) Forms contained in the HRC Attachment 2: 1) HRC Contract Participation Form, 2) HRC "Good Faith Outreach" Requirements Form, 3) HRC Non-Discrimination Affidavit, 4) HRC Joint Venture Form (if applicable), and 5) HRC Employment Form. If these forms are not returned with the proposal, the proposal may be determined to be non-responsive and may be rejected.

b. Please submit only two copies of the above forms with your proposal. The forms should be placed in a separate, sealed envelope labeled HRC Forms.

If you have any questions concerning the HRC Forms, you may call **Selormey Dzikunu**, the Human Rights Commission Contract Compliance Officer for the **San Francisco Police Department** at **415-274-0511**.

RFP for Pre – Employment Psychological Screening Services

VII. Contract Requirements

A. Standard Contract Provisions

The successful proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as Appendix C. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

Proposers are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits, (§34 in the Agreement); the Minimum Compensation Ordinance (§43 in the Agreement); the Health Care Accountability Ordinance (§44 in the Agreement); the First Source Hiring Program (§45 in the Agreement); and applicable conflict of interest laws (§23 in the Agreement), as set forth in paragraphs B, C, D, E and F below.

B. Nondiscrimination in Contracts and Benefits

The successful proposer will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available on the HRC's website at www.sfhrc.org.

C. Minimum Compensation Ordinance (MCO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in S.F. Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements. For the contractual requirements of the MCO, see §43.

For the amount of hourly gross compensation currently required under the MCO, see www.sfgov.org/olse/mco. Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract.

Additional information regarding the MCO is available on the web at www.sfgov.org/olse/mco.

D. Health Care Accountability Ordinance (HCAO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Health Care Accountability Ordinance (HCAO), as set forth in S.F. Administrative Code Chapter 12Q. Contractors should consult the San Francisco Administrative Code to determine their

RFP for Pre – Employment Psychological Screening Services

compliance obligations under this chapter. Additional information regarding the HCAO is available on the web at www.sfgov.org/olse/hcao.

E. First Source Hiring Program (FSHP)

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at www.sfgov.org/moed/fshp.htm and from the First Source Hiring Administrator, (415) 401-4960.

F. Conflicts of Interest

The successful proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful proposer that the City has selected the proposer.

VIII. Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Contract Award

Within five working days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day after the City's issuance of the notice of intent to award. Contract award will be posted on the City of San Francisco Office of Contract administration/Purchasing web site.

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

C. Delivery of Protests

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

Officer Shawn Wallace # 1104
San Francisco Police Department
Legal Division, Room # 575
Hall of Justice
850 Bryant Street
San Francisco, CA 94103

RFP for Pre – Employment Psychological Screening Services

Appendix B
Standard Forms

The requirements described in this Appendix are separate from those described in Appendix A.

Before the City can award any contract to a contractor, that contractor must file three standard City forms (items 1-3 on the chart). Because many contractors have already completed these forms, and because some informational forms are rarely revised, the City has not included them in the RFP package. Instead, this Appendix describes the forms, where to find them on the Internet (see bottom of page 2), and where to file them. If a contractor cannot get the documents off the Internet, the contractor should call (415) 554-6248 or e-mail Purchasing (purchasing@sfgov.org) and Purchasing will fax, mail or e-mail them to the contractor.

If a contractor has already filled out items 1-3 (see note under item 3) on the chart, the contractor should not do so again unless the contractor's answers have changed. To find out whether these forms have been submitted, the contractor should call Vendor File Support in the Controller's Office at (415) 554-6702.

If a contractor would like to apply to be certified as a local business enterprise, it must submit item 4. To find out about item 4 and certification, the contractor should call Human Rights Commission at (415) 252-2500.

Item	Form name and Internet location	Form	Description	Return the form to; For more info
1.	Request for Taxpayer Identification Number and Certification www.sfgov.org/oca/purchasing/forms.htm www.irs.gov/pub/irs-fill/fw9.pdf	W-9	The City needs the contractor's taxpayer ID number on this form. If a contractor has already done business with the City, this form is not necessary because the City already has the number.	Controller's Office Vendor File Support City Hall, Room 484 San Francisco, CA 94102 (415) 554-6702
2.	Business Tax Declaration www.sfgov.org/oca/purchasing/forms.htm	P-25	All contractors must sign this form to determine if they must register with the Tax Collector, even if not located in San Francisco. All businesses that qualify as "conducting business in San Francisco" must register with the Tax Collector.	Controller's Office Vendor File Support City Hall, Room 484 San Francisco, CA 94102 (415) 554-6702

RFP for Pre - Employment Psychological Screening Services

Item	Form name and Internet location	Form	Description	Return the form to; For more info
3.	S.F. Administrative Code Chapters 12B & 12C Declaration: Nondiscrimination in Contracts and Benefits www.sfgov.org/oca/purchasing/forms.htm - In Vendor Profile Application	HRC-12B-101	Contractors tell the City if their personnel policies meet the City's requirements for nondiscrimination against protected classes of people, and in the provision of benefits between employees with spouses and employees with domestic partners. Form submission is not complete if it does not include the additional documentation asked for on the form. Other forms may be required, depending on the answers on this form. Contract-by-Contract Compliance status vendors must fill out an additional form for each contract.	Human Rights Comm. 25 Van Ness, #800 San Francisco, CA 94102-6059 (415) 252-2500
4.	HRC LBE Certification Application www.sfgov.org/oca/purchasing/forms.htm - In Vendor Profile Application		Local businesses complete this form to be certified by HRC as LBEs. Certified LBEs receive a bid discount pursuant to Chapter 14B when bidding on City contracts. To receive the bid discount, you must be certified by HRC by the proposal due date.	Human Rights Comm. 25 Van Ness, #800 San Francisco, CA 94102-6059 (415) 252-2500

Where the forms are on the Internet

Office of Contract Administration

Homepage: www.sfgov.org/oca/
 Purchasing forms: Click on "Required Vendor Forms" under the "Information for Vendors and Contractors" banner.

Human Rights Commission

HRC's homepage: www.sfhrc.org
 Equal Benefits forms: Click on "Forms" under the "Equal Benefits" banner near the bottom.
 LBE certification form: Click on "Forms" under the "LBE" banner near the bottom



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

GAVIN NEWSOM
MAYOR

April 23, 2008

NOTICE OF CIVIL SERVICE COMMISSION ACTION

ALICIA D. BECERRIL
PRESIDENT

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBERS 4131-07/08 THROUGH 4149-07/08; AND 1003-08/09.

DONALD A. CASPER
VICE PRESIDENT

At its meeting of April 21, 2008 the Civil Service Commission had for its consideration the above matter.

MORGAN R. GORRONO
COMMISSIONER

PLEASE NOTE: *It is important that a copy of this action be kept in the department files as you will need it in the future as proof of Civil Service Commission approval.*

MARY Y. JUNG
COMMISSIONER

It was the decision of the Commission to:

YU-YEE WU
COMMISSIONER

- (1) Postpone PSC #4134-07/08 to the meeting of May 19, 2008 at the request of the Department of Human Resources.
- (2) Adopt the Human Resources Director's report on PSC #s 4141-07/08, 4142-07/08 and 4143-07/08. Notify the offices of the Controller and the Purchaser. Note: The Public Utilities Commission to submit a report in 30 days to the Commission on their discussions with IFPTE Local 21.
- (3) Adopt the Human Resources Director's report on all remaining contracts. Notify the offices of the Controller and the Purchaser.

ANITA SANCHEZ
EXECUTIVE OFFICER

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

CIVIL SERVICE COMMISSION

Anita Sanchez
ANITA SANCHEZ
Executive Officer

Attachment

- c: Shawn Allison, Department of Telecommunications & Information Services
- Parveen Boparai, Municipal Transportation Agency
- Eugene Clendinen, District Attorney
- Micki Callahan, Human Resources Director
- Connie Chang, Public Utilities Commission
- Gordon Choy, Department of Public Works
- Shamica Jackson, Public Utilities Commission
- Jennifer Johnston, Department of Human Resources
- Galen Leung, San Francisco International Airport
- Julian Low, Mayor's Office of Business & Economics
- Joan Lubamersky, Administrative Services
- Patti Martin, Department of Human Resources
- Jonathan Nelly, Department of Human Resources
- Shawn Wallace, Police Commission File
- Chron

POSTING FOR:
April 21, 2008

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

FSC No.	DeptNo	DeptName	Approval Type	Contract Amount	Description of Work	Duration
4132-07/08	27	Alport Commission	Regular	\$84,000.00	Will provide pre-employment drug testing services and drug & alcohol testing for reasonable suspicion, random, post-accident, return-to-duty and follow-up testing.	31-Aug-16
4133-07/08	27	Alport Commission	Regular	\$120,000.00	Will provide services to assess business, management, infrastructure, construction safety, supply logistics, community relationship and stakeholder risks and to propose mitigation measures to improve the Airport's risk profile.	30-Apr-10
4134-07/08	33	Department of Human Resources	Regular	\$7,500,000.00	Will provide complete workers' compen. adjusting services, including investigation and adjudication of claims, data recording, payment processing, support of both litigation and rehabilitation processes, case estimate evaluation and preparation of reports.	31-Jul-11
4135-07/08	35	Municipal Transportation Agency	Regular	\$150,000.00	Will provide an off-site facility to collect pre-employment, post-accident, return-to-duty, reasonable suspicion breath and urine samples during normal working hours and/or after hours for MTA employees and contractors in compliance with DOT/FTA.	30-Jun-11
4136-07/08	35	Municipal Transportation Agency	Regular	\$239,470.00	Will provide 110 Muni diesel and electric coaches with Automatic Passenger Counting (APC) equipment. This equipment will count boardings and alighting to determine accurate ridership numbers.	31-Dec-08
4137-07/08	35	Municipal Transportation Agency	Regular	\$19,000,000.00	Will provide a 27-month fare box refurbishment project which includes 15 months installation of refurbished fare boxes on all revenue vehicles and back-end system and 12 months post-installation system support, for a total amount not to exceed \$19 million.	30-Sep-10
4138-07/08	38	Police Department	Regular	\$600,000.00	Will provide Phlebotomy services 24 hours per day, 7 days a week, to conduct blood draws at various locations of suspected drunk drivers for law enforcement agencies in the City and County of San Francisco.	30-Jun-12
4139-07/08	30	Police Department	Regular	\$850,000.00	Will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.	30-Jun-12

POSTING FOR
April 21, 2008

RECOMMENDED APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACTS

PSC No.	DeptNo	DeptName	Approval Type	Contract Amount	Description of work	Duration
4140-07/08	38	Police Department	Regular	\$2,720,000.00	Will provide Crime Prevention Education Services as follows: Neighborhood watch organizing, residential and commercial security services, presentations on personal safety, robbery and burglary prevention, and violence in the work place.	30-Jun-12
4141-07/08	40	San Francisco Public Utilities Commission	Regular	\$28,000,000.00	Will provide Bay Division Regional Construction Management (CM) Services to oversee a specific WSIP construction project, the Bay Tunnel, on behalf of the SFPUC.	01-Feb-14
4142-07/08	40	San Francisco Public Utilities Commission	Regular	\$27,700,000.00	Will provide San Joaquin Regional Construction Management (CM) Services to oversee a specific WSIP construction project, the Bay Tunnel, on behalf of the SFPUC.	01-Feb-14
4143-07/08	40	San Francisco Public Utilities Commission	Regular	\$17,700,000.00	Will provide Sunol Valley Regional Construction Management (CM) Services to oversee a specific WSIP construction project, the Bay Tunnel, on behalf of the SFPUC.	01-Feb-14
4144-07/08	40	San Francisco Public Utilities Commission	Regular	\$65,000.00	Will provide monitoring of federally-endangered San Francisco garter snake (SFGS) and federally threatened Californian red-legged frog (CRLF) at three locations on the Peninsula Watershed.	31-Dec-08
4145-07/08	40	San Francisco Public Utilities Commission	Regular	\$405,000.00	Will provide independent technical review to ensure that the Master Plan incorporates not only proven best technologies, but also cost effective, environmentally sensitive and community responsive solutions.	31-Jul-10
4148-07/08	70	Risk Management/GSA-City Administrator	Regular	\$9,500,000.00	Will create a pre-qualified list of insurance brokers and risk mgmt. services firms for as needed support in the areas of broker services, risk analysis and Enterprise Risk Management consultant services, insurance services and claims support services.	30-Jun-15
4147-07/08	75	Dept. of Telecommunications and Information Services	Regular	\$0.00	Will provide an audit to the City's telecommunication bills to identify any potential billing errors by the carriers and prepare documentation for the City to request refunds for overcharges; make recommendations to minimize risk of overbilling.	21-Apr-09
4149-07/08	75	Dept. of Telecommunications and Information Services	Regular	\$500,000.00	Will provide at the approval of in house staff, as needed printing and bindery services to include low color printing, collating, folding and binding.	14-Apr-13
4149-07/08	80	Public Works	Regular	\$4,000,000.00	Will provide resident engineers, field engineers, inspectors, specialty engineers, office engineers, scheduling engineers, public outreach staff, construction management support, field office administrative staff, and supplemental construction services.	16-Jun-13

PERSONAL SERVICES CONTRACT SUMMARY

DATE: 03-05-2008

DEPARTMENT NAME: Police

DEPARTMENT NUMBER: 38

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

TYPE OF REQUEST: (X) INITIAL REQUEST [] MODIFICATION (PSC# [])
Pre Employment Psychological Screening Services

TYPE OF SERVICE: General Fund

FUNDING SOURCE: \$850,000.00 7-1-08 - 6-30-2012

PSC AMOUNT: PSC DURATION:

1. DESCRIPTION OF WORK

A. Concise description of proposed work: The vendor will provide the San Francisco Police Department with psychological evaluations of final entry level police officer candidates and refinement of predictive validity assessment procedures.

B. Explain why this service is necessary and the consequences of denial: Pre employment psychological evaluations of police officer candidates is required by section #1031 (f) of the California code of Regulations. Denial would prevent the San Francisco Police Department from hiring police officers.

C. Explain how this service has been provided in the past (if this service was previously approved by the Civil Service Commission, indicate most recent personal services contract approval number. This service was provided through PSC # 4076-03/04, and PSC # 4092-07/08.

D. Will the contract(s) be renewed: Contract is currently out to bid.

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

Local # 790 Union Name Signature of person mailing / faxing form Date 3-19-08
Local #21 Union Name Signature of person mailing / faxing form Date 3-19-08

RFP sent to Union Name, on Date Signature

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC#
STAFF ANALYSIS/RECOMMENDATION:
CIVIL SERVICE COMMISSION ACTION:

3. DESCRIPTION OF REQUIRED SKILLS/EXPERTISE

A. Specify required skills and/or expertise. Section # 1031 (f) of the California Code of Regulations, requires a Ph.D. in Psychology with at least five years of post graduate experience in diagnosis and treatment of emotional and mental disorders.

B. Which, if any, civil service class normally performs this work? Though class 2574, Clinical Psychologist and class 2576, perform psychological evaluations, those classes do not have the required skills and expertise.

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If yes, explain: Yes the vendor will have proprietary software which will be used for psychological evaluation, and tracking of police officer applicants.

4. WHY CLASSIFIED CIVIL SERVICE CANNOT PERFORM

A. Explain why civil service classes are not applicable: The level of expertise and experience does not exist in the current Civil Service classifications. The vendor will also have proprietary software.

B. Would it be practical to adopt a new civil service class to perform this work? Explain: No. The services will be provided on an as needed basis.

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

Yes No

A. Will the contractor directly supervise City and County employees? Yes No

B. Will the contractor train City and County employees?
 - Describe training and indicate approximate number of hours.
 - Indicate occupational type of City and County employees to receive training (e.g., clerks, civil engineers, etc.) and approximate number to be trained. Yes No

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

D. Are there federal or state grant requirements regarding the use of contractual services? Yes No

E. Has a board or commission determined that contracting is the most effective way to provide this service? Yes No

F. Will the proposed work be completed by a contractor that has a current personal services contract with your department? Yes, "Law Enforcement Psychological Services" Yes No

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



Signature of Departmental Personal Services Contract Coordinator

Officer Shawn Wallace
 Print or Type Name

553-1096
 Telephone Number

Hall of Justice, Room 575
 850 Bryant Street
 San Francisco, Calif. 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION – REC Dept. Code: REC

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

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Park Planning

Funding Source: Coastal Conserv Priority Grant PSC Duration: 4 years 1 day
PSC Amount: \$500,000 PSC Est. Start Date: 01/01/2015 PSC Est. End Date: 01/01/2019

1. Description of Work

A. Scope of Work:

The Priority Conservation Area (PCA) Grant will fund park planning for 900 Innes, a property recently acquired by the City, which is adjacent to India Basin Shoreline Park and India Basin Shoreline Open Space. 900 Innes consists of 3 acres, 1.9 of which are on land. Innes Avenue and neighboring areas have been included for planning purposes in the Bayview Hunters Point Area Plan and the India Basin Shoreline SubArea Plan, in addition to the San Francisco Bay Trail Plan and the Port of San Francisco's 13-mile Blue Greenway Plan. On this site, the Recreation and Park Department (RPD) plans to develop a new full service park for the community, providing residents local access to open space and parkland resources as well as new recreational opportunities. RPD will contract with a consultant to do the following: public outreach to the community and stakeholders; site analysis and preparation of environmental studies and documents for compliance with the California Environmental Quality Act (CEQA); and a conceptual park plan with cost estimates and strategies for the implementation future park improvements.

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

900 Innes, San Francisco, CA 94124, is adjacent to 700 Innes, a property on which affordable housing and park space is currently being designed. Ideally, the planning for 900 Innes should be done in conjunction with that for 700 Innes. A consultant will bring extensive knowledge of the India Basin natural areas and the adjacent India Basin Shoreline Park will allow for the 900 Innes park planning process to begin immediately. This process will engage Bayview-based community leaders and neighborhood groups and the seek trust they have gained from this diverse, often under-served community is essential to a successful stakeholder engagement process. The service will allow for continuity in the project planning and development of the sites. Denial will cause delay of the project and could result in additional planning and development costs and loss of funding.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.
This service has not been completed by RPD in this manner previously.

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

2. Union Notification: On 10/17/2014, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40297 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 12/15/2014

-134-

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:
 Extensive knowledge of the characteristics of, as well as inherent challenges with, the physical and natural environments at India Basin. Experience and relationships with community leaders in Bayview area for partnerships and support of community.

B. Which, if any, civil service class(es) normally perform(s) this work?
 5298,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:
 City planning department staff do not complete the actual environmental and planning documents, they provide overall project guidance and review.

B. Would it be practical to adopt a new civil service class to perform this work? Explain.
 No. As stated, Planning Department staff do not complete the actual environmental and planning documents.

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

YES NO

- A. Will the contractor directly supervise City and County employee? YES NO
- B. Will the contractor train City and County employee? YES NO
- C. Are there legal mandates requiring the use of contractual services? YES NO
- D. Are there federal or state grant requirements regarding the use of contractual services? YES NO
- E. Has a board or commission determined that contracting is the most effective way to provide this service? YES NO
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? YES NO

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
 ON 11/19/2014 BY:

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

Address: 501 Stanyan Street San Francisco, CA

Receipt of Union Notification(s)

McFadden, Sean (REC)

From: dhr-psccordinator@sfgov.org on behalf of sean.mcfadden@sfgov.org
Sent: Friday, October 17, 2014 3:59 PM
To: McFadden, Sean (REC); L21PSCReview@ifpte21.org; Webster, Bridget (REC); Isen, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 40297 - 14/15

RECEIPT for Union Notification for PSC 40297 - 14/15 more than \$100k

The RECREATION AND PARK COMMISSION -- REC has submitted a request for a Personal Services Contract (PSC) 40297 - 14/15 for \$500,000 for Initial Request services for the period 01/01/2015 - 01/01/2019. 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/4086> 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)

IB:

Explain why this service is necessary and the consequences of denial:

900 Innes, San Francisco, CA 94124, is adjacent to 700 Innes, a property on which affordable housing and park space is currently being designed. Ideally, the planning for 900 Innes should be done in conjunction with that for 700 Innes. A consultant will bring extensive knowledge of the India Basin natural areas and the adjacent India Basin Shoreline Park will allow for the 900 Innes park planning process to begin immediately. This process will engage Bayview-based community leaders and neighborhood groups and the trust they have gained from this diverse, often under-served community is essential to a successful stakeholder engagement process. The service will allow for continuity in the project planning and development of the sites. Denial will cause delay of the project and could result in additional planning and development costs and loss of funding.

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 Omit Posting

Type of Service: Web Software Development and Support Services

Funding Source: General Funds & Enterprise Funds PSC Duration: 4 years
PSC Amount: \$2,800,000 PSC Est. Start Date: 07/01/2015 PSC Est. End Date: 06/30/2019

1. Description of Work

A. Scope of Work:

The primary objective of this project is to implement a citywide Web Content Management (WCM) solution that is sufficiently scalable to address the growing needs of the City's websites while offering the flexibility required to satisfy City departments' unique needs. The project envisions the vendor working with City staff to setup and support the WCM cloud environment that will enable the City to build custom websites using a more sophisticated software development system, the Drupal system. This more sophisticated and flexible solution will replace the City's current low-cost solution offered by our incumbent Web content management vendor, Vision Internet, a vendor procured through the Technology Store.

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

This project will allow the City to implement a more complex/sophisticated Web content management solution that offers the flexibility to build fully custom websites for City departments beyond the capabilities currently offered by our incumbent vendor.

Please see the entire response to 1B in the uploaded attachment.

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

The web software development needs of the various City Departments is currently serviced by a low-cost vendor from the Technology Store, Vision Internet, with a solution limited in its capabilities. Given the City departments' increasing demand for custom websites, the Department of Technology is seeking a one-stop shop vendor who can offer a more sophisticated solution in order to service DT's wide customer base of city departments.

D. Will the contract(s) be renewed? No, the annual subscription with Vision Internet will not be renewed.

2. **Union Notification:** On 10/20/2014, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21,

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44508 - 14/15

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 12/15/2014

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Open Source Frameworks, Drupal Core & OpenPub WCM, Drupal Modules, PHP, MySQL, Responsive Web technologies, Apache, Memcache, Varnish, SSL, AWS, HTML/CSS, Javascript/Jquery.

B. Which, if any, civil service class(es) normally perform(s) this work?
1042,1043,

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

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Given the huge variation and continuous innovation of web and open source technologies, the City's Department of Technology Web services staff will need to work with a vendor for these services as the team does not have the required skill sets. This vendor partnership will ensure that City staff can provide a comprehensive web solution to Departments.

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

No, a new civil service class is not required to perform this work. We will continue to invest in transferring as much knowledge as possible, from the vendor to the DT Web Services Team, who will be responsible for working with City departments.

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

YES NO

- A. Will the contractor directly supervise City and County employee? YES NO
- B. Will the contractor train City and County employee?
There will be no end-user training. YES NO
- C. Are there legal mandates requiring the use of contractual services? YES NO
- D. Are there federal or state grant requirements regarding the use of contractual services? YES NO
- E. Has a board or commission determined that contracting is the most effective way to provide this service? YES NO
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? YES NO

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 11/19/2014 BY:

Name: Jolie Gines Phone: 415 581 3974 Email: jolie.gines@sfgov.org

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

Receipt of Union Notification(s)

Wong, Fan-Wa (TIS)

From: dhr-psccordinator@sfgov.org on behalf of jolie.gines@sfgov.org
Sent: Monday, October 20, 2014 4:18 PM
To: Gines, Jolie; L21PSCReview@ifpte21.org; Wong, Fan-Wa (TIS); Isen, Richard (TIS); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44508 - 14/15

RECEIPT for Union Notification for PSC 44508 - 14/15 more than \$100k

The GENERAL SERVICES AGENCY - TECHNOLOGY -- TIS has submitted a request for a Personal Services Contract (PSC) 44508 - 14/15 for \$2,800,000 for Initial Request services for the period 07/01/2015 -- 06/30/2019. 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/4093> 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)

Response to 1B: Explain why the service is necessary and the consequences of denial.

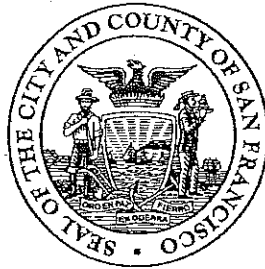
This project will allow the City to implement a more complex/sophisticated Web content management solution that offers the flexibility to build fully custom websites for City departments beyond the capabilities currently offered by our incumbent vendor.

PROBLEM: As a result of the limitations of our current system, many City departments already have or are considering outsourcing their entire web operations to external vendors completely bypassing the City's web services offered by the Department of Technology (DT).

SOLUTION: Pursuing this solution will allow the City to implement a flexible enterprise solution that can accommodate the different needs of City Departments. Departments will work with City staff at the Department of Technology (supported by this vendor) to deliver web services.

CONSEQUENCES OF DENIAL: Without this more sophisticated solution, the Department of Technology will not be able to build fully custom websites for City departments, as such demand is on the rise. The result of a denial will be an acceleration of outsourcing of custom websites services by the various City departments to multiple vendors since the solution offered by DT's current vendor can no longer meet their needs. There are already over a dozen of external websites and almost half a dozen of City departments preparing to move outside and use their own vendors. Using a central solution administered by DT allows the City to leverage the buying power of all city agencies to maximize the value of its spend. Converting to a higher-end solution allows DT to better service the disparate needs of its wide customer base of City departments.

City and County of San Francisco
Request for Proposals for
Web Content Management (Drupal) Cloud Solution



Date issued:	January 5, 2015
Pre-proposal conference:	10 a.m., January 21, 2015
Proposal due:	5 p.m., February 20, 2015

Request for Proposals for Web Content Management (Drupal) Cloud Solution

TABLE OF CONTENTS

	<u>Page</u>
I. Introduction and Schedule	1
II. Scope of Work	2
III. Submission Requirements.....	3
IV. Evaluation and Selection Criteria	6
V. Pre-proposal conference and Contract award	9
VI. Contract Requirements.....	15
VII. Protest Procedures.....	17

Appendices:

- A. CMD Attachment 2: Requirements for Architecture, Engineering and Professional Services Contracts, for contacts \$50,000 and over document (separate document).

All Proposers must submit the following forms:

Form 3 CMD Non-discrimination Affidavit

However, if you are a CMD-certified LBE applying for the LBE Rating Bonus, you must submit the following forms:

- Form 2A CMD Contract Participation form
- Form 3 CMD Non-discrimination Affidavit
- Form 4 Joint Venture Participation Schedule, if applicable
- Form 5 CMD Employment form

- B. Standard Forms: Listing and Internet addresses of Forms related to Taxpayer Identification Number and Certification, to Business Tax Declaration, and to Chapters 12B and 12C, and 14B of the S.F. Administrative Code. B-1
- C. Agreement for Professional Services (form P-500 - Required) separate document
- D. Worksheet 1: WCM Solution Evaluation Matrix separate document
Worksheet 2: WCM Solution Scope of Work & Response Matrix
Reference Section 1 & 2: Sites and Modules

- E. Service Level Agreement (Required) separate document
- F. Minimum Qualifications Worksheet (Required) separate document

RFP for Web Content Management (WCM) Cloud Solution

Request for Proposals for
Web Content Management (Drupal) Cloud Solution

I. Introduction and Schedule

A. General

The City and County of San Francisco requests proposal from qualified respondents that are interested in providing professional services to assist CCSF in setting up and supporting a Web Content Management (WCM) cloud-based solution.

The primary objective of this request is to implement a citywide WCM solution that is sufficiently scalable to address the growing needs of CCSF's web site while offering the flexibility required to satisfy CCSF agencies' unique needs. The request requires the delivery of 4 types of services: 1) Setup of WCM managed cloud environment; 2) Setup a Drupal-based WCM solution; 3) Provision of ongoing support of the WCM managed cloud solution; 4) Provision of ongoing support for the Drupal-based WCM solution.

The contract shall have an original term of 4 years. In addition, the CCSF shall have 2 options to extend the term for a period of 2 years each, which the CCSF may exercise in its sole, absolute discretion.

B. Schedule

The anticipated schedule for selecting a consultant is:

<u>Proposal Phase</u>	<u>Date</u>
RFP is issued by the City	January 5, 2015
Pre-proposal conference	January 21, 2015
Deadline for submission of written questions or requests for clarification	January 29, 2015
Proposals due	February 20, 2015
Oral interview with firms selected for further consideration	March 2015