



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Date: February 8, 2021
To: Department Heads
From: Sailaja Kurella, Acting Director of the Office of Contract Administration and Purchase *SK*
Subject: Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Greetings!

Please find attached, in numerical order, a listing of all City-wide contract and solicitation templates as of February 2021. The last revision date for each template is notated as "(Month-Year)" following the Template ID.

- **Black Font:** Unchanged templates.
- **Red Font:** Discontinued and replaced templates.
- **Green Font:** New or updated templates.

Public Facing Contract Templates:

- Public-facing copies of each template without City attorney guidance are available at <https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates>.

City Facing Contract Templates:

- Confidential copies of each template with City attorney guidance are available at OCA's citywide SharePoint site: <https://sfgov1.sharepoint.com/:f:/s/ADM-OCAWaiver/EguXqJbN87pOngx0i57D71oBxclgAnzZOAL02iw-4X5ajg?email=taraneh.moayed%40sfgov.org&e=5%3aJ4K2Gg&at=9>.

DO NOT SHARE CONFIDENTIAL, CITY FACING COPIES OF CITY CONTRACT TEMPLATES WITH THE PUBLIC UNTIL ALL CITY ATTORNEY GUIDANCE HAS BEEN COMPLETELY REMOVED.

New Solicitation Templates:

- In addition, OCA has developed new Request for Proposals and Low Bid solicitation templates. These templates incorporate requirements related to City contracting and departments and provide useful commentary and suggestions to ensure a fair and transparent solicitation. *Departments are encouraged to use these templates and/or ensure topics covered therein are incorporated into existing Department solicitation templates.* You can find these new templates here: <https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates>.

If you have any questions, please reach out to me at Sailaja.Kurella@sfgov.org, or to Taraneh Moayed at Taraneh.Moayed@sfgov.org.

* * *



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Template ID	Template Name	Status	Comments
P-501 (8-15)	Individual Contractor Template	Discontinued & Replaced	The P-501 has been superseded by the P-601, in an Article-based format.
P-520 (8-15)	Equipment Lease Template	No Change	The P-520 may be used for the lease or rental of equipment.
P-530 (8-15)	Equipment Maintenance Template	Discontinued & Replaced	The P-530 has been superseded by the P-630, in an Article-based format.
P-540 (8-14)	Software Maintenance Template	Discontinued & Replaced	The P-540 has been superseded by the P-640, in an Article-based format.
P-545 (8-14)	Software License Template	Discontinued & Replaced	The P-545 has been superseded by the P-645, in an Article-based format. While the P-545 was limited to purchases for on premise licenses only, the P-645 addresses both the on-premise software licenses and corresponding maintenance services.
P-550 (6-19)	Amendment Template (P-5XX Series)	No Change	The P-550 should be used to amend all existing "P-5XX" series templates.
P-600 (11-20)	Professional Services Template	Updated	The P-600 is the most commonly used template for Professional Services. It is designed to fit most situations. The template has been updated since the 4-19 version, but the changes are primarily clerical improvements.
P-601 (11-20)	Individual Contractor Template	New	The P-601 is the successor to the P-501. This template is an abbreviated form of the P-600 with sections relating to employees and subcontracting removed. This template may only be used for Agreements with an individual.
P-606 (11-20)	Chapter 6 Professional Services Template	Updated	The P-606 is to be used by Chapter 6 departments when procuring professional services related to public works and improvements under Administrative Code Section 6.40. The template has been updated since the 4-19 version, but the changes are primarily clerical improvements. OCA does not maintain this template, nor approve Chapter 6 Professional Services contracts. The template is hosted by OCA as a courtesy to Chapter 6 departments.



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Template ID	Template Name	Status	Comments
P-607 (11-20)	Agreement with Public Entities Template	New	The P-607 is a variant of the P-600 with a primary purpose of serving as a starting point for agreements with public entities. Because many of the City’s standard terms and policies do not apply to governmental entities, this template gives instructions and guidance on how to approach those types of agreements.
P-629 (11-20)	Licensed Content for Internal Government Use Template	New	The P-629 may be used to purchase or subscribe to content in an electronic form, almost always via the internet. Usually this is a lower value transaction. This is commonly referred to as “Online Content.” If the Licensed Content includes interactive services or personal involvement, this template may not be appropriate, and a P-600 should be used.
P-630 (11-20)	Equipment Maintenance Agreement Template	New	The P-630 is a successor to the P-530. This template is contemplated for use when the City must hire a contractor to ensure owned equipment is maintained in working order.
P-640 (11-20)	Software Maintenance Template	New	The P-640 may be used for standalone software maintenance for previously purchased licenses.
P-642 (11-20)	Software Development Template	Updated	The P-642 is used when hiring a contractor to develop software for the City.
P-645 (11-20)	Software License and Maintenance Services Template	New	The P-645 is a successor to the P-545. It is used when acquiring an on-premise software license and maintenance services.
P-648 (11-20)	Software as a Service and Hosted Services Template	Updated	The P-648 is used when purchasing cloud-based software, software as a service (SaaS), and hosted data agreements. If technology or software will be a significant aspect of a services, this template should be a starting point. This is a sophisticated template that offers the highest level of protection for the City and its data. This iteration offers improved security language, emphasis on data protection, streamlined clauses, and updated ADA language.
P-649 (11-20)	Software License with Professional and Maintenance Services Template	New	The P-649 is used when purchasing on-premise software license, software maintenance and professional services. Because of the wide range of legal issues, it is comprehensive, and must be tailored to each specific scope of services.



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Template ID	Template Name	Status	Comments
P-650 (11-20)	P-650 Amendment Template	Updated	The P-650 should be used to amend all existing “P-6XX” series templates.
P-660 (11-20)	Assignment and Assumption Template	Updated	The P-660 is used when a contractor transfers some or all of its obligations under a contract with the City and the City consents to the transfer. The result of the transfer will likely be that three parties (including the City) have continuing obligations stemming from the original contract. An Assignment and Assumption is necessary to ensure that the party assuming obligations under the original contract agrees to all City contracting requirements. It will also be necessary for payment to new contractor.
P-665 (11-20)	Novation Template	Updated	The P-665 is used when a contractor changes its corporate identity by merging into another entity (or otherwise changes ownership such that a new entity owns and controls the contractor) and assumes all of the contractor’s obligations under the City contract. The result of the transfer will likely be that two parties (including the City) have continuing obligations stemming from the original agreement. A Novation is necessary to ensure that the party assuming obligations under the original contract agrees to all City contracting requirements. It will also be necessary for payment to new contractor.
G-100 (4-19)	Grant Template (City is Grantor)	No Change	The G-100 is used for Grants. Grant agreements are presently subject to the Consensus Agreement Guidelines and other reporting requirements available from the Controller. The Board of Supervisors may pass legislation subjecting grants to new legal requirements. OCA does not approve Grants agreements. This template is hosted by OCA as a courtesy to departments.
G-150 (6-19)	Grant Amendment Template (City is Grantor)	No Change	Previously informal, the G-150 is used for modifications of Grant agreements. Grant agreements are presently subject to the Consensus Agreement Guidelines and other reporting requirements available from the Controller. The Board of Supervisors may pass legislation subjecting grants to new legal requirements. OCA does not approve Grants agreements. This template is hosted by OCA as a courtesy to departments.



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Template ID	Template Name	Status	Comments
P-690 (11-20)	Request for Proposals (RFP) Template Available at: https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates .	Updated	The P-690 RFP Template has been updated to provide, among other things, clarity related to: 1) City’s solicitation and contracting procedures to ensure more consistency and transparency between City departments; 2) Instructions regarding City’s requirements for City suppliers, including City’s social policy requirements; 3) Cybersecurity and Chapter 19B guidance; and 4) Suggestions for how to evaluate proposals. While City departments are not required to use this template, they are encouraged to address the concepts raised therein, particularly those related to City’s solicitation and contracting procedures and City’s requirements for City suppliers.
P-695 (11-20)	Invitation for Bids (IFB) Template Available at: https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates .		The P-695 IFB Template is a new template for solicitations for which lowest price is the primary consideration. Like the P-690 RFP, this template provides, among other things, clarity related to: 1) City’s solicitation and contracting procedures to ensure more consistency and transparency between City departments; 2) Instructions regarding City’s requirements for City suppliers, including City’s social policy requirements; 3) Cybersecurity and Chapter 19B guidance; and 4) Suggestions for how to evaluate proposals. While City departments are not required to use this template, they are encouraged to address the concepts raised therein, particularly those related to City’s solicitation and contracting procedures and City’s requirements for City suppliers.



London N. Breed
Mayor

Sailaja Kurella
Acting Director and Purchaser

Newly Activated, Deactivated or Updated Contract Templates as of February 1, 2021

Template ID	Template Name	Status	Comments
P-697 (11-20)	Request for Qualifications (RFQ) Template Available at: https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates .	New	The P-697 RFQ template is a new template that provides, among other things, clarity related to: 1) City’s solicitation and contracting procedures when creating and selecting from a Prequalified Pool of suppliers; 2) Instructions regarding City’s requirements for City suppliers, including City’s social policy requirements; 3) Cybersecurity and Chapter 19B guidance; and 4) Suggestions for how to evaluate proposals. While City departments are not required to use this template, they are encouraged to address the concepts raised therein, particularly City’s solicitation and contracting procedures for RFQs and City’s requirements for City suppliers.