

City and County of San Francisco
London N. Breed, Mayor



Office of the City Administrator
Carmen Chu, City Administrator
Sailaja Kurella, Director
Office of Contract Administration/Purchasing

DATE: February 2, 2022
TO: Department Directors, City and County of San Francisco
FROM: Sailaja Kurella, Director of the Office of Contract Administration and Purchaser
SUBJECT: Newly Activated, Deactivated or Updated Contract Templates as of January 1, 2022

A handwritten signature in black ink, appearing to be "SK", located to the right of the "FROM:" line.

Please find attached, in numerical order, a listing of all City-wide contract templates as of January 1, 2022. The last revision date for each template is notated as “(Month-Year)” following the Template ID.

Templates are available for download at <https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates>. Each template is provided with and without confidential information. As a reminder, *please do not share any templates with confidential information with members of the public.*

A summary of the substantive changes to each template is provided in the attached table. As applicable, the updated templates include contractor vaccination terms pursuant to the [Mayoral Order](#) issued on October 8, 2021 and the [Updated City Contractor Vaccination Policy](#) dated January 24, 2022.

Please do not hesitate to reach out to Taraneh.Moayed@sfgov.org with any questions regarding these templates.

Overview of Substantive Changes

Template	Document being Replaced	Substantive Changes	Template Purpose
COVID (4-21) COVID Expedited Amendment Template	Discontinued	Discontinued	This template was used to expedite non COVID contracts that met certain expiration dates for a period of up to 12 months. It is no longer available for use.
NDA (1-22) Non Disclosure Agreement – Current City Suppliers	Replaces NDA (4-21)	1. Updated signature block (City Attorney)	Pre-approved as to form NDA template for use in conjunction with the City’s cybersecurity assessment process with respect to current City suppliers.
NDA (1-22) Non Disclosure Agreement – Non Current City Suppliers	Replaces NDA (4-21)	1. Updated signature block (City Attorney)	Pre-approved as to form NDA template for use in conjunction with the City’s cybersecurity assessment process with respect to non City suppliers.
G-100 (1-22) Grant Agreement Template (City as Grantor)	Replaces G-100 (4-19)	1. Updated signature block (City Attorney) 2. Added contractor vaccination terms	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 (1-22) Grant Amendment Template for G- 100 Agreements	Replaces G-150 (6-19)	1. Updated signature block (City Attorney)	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

Template	Document being Replaced	Substantive Changes	Template Purpose
			approve Grants agreements. This template is hosted by OCA as a courtesy to departments.
G-200 (1-22) Grant Donations	Replaces G-200 (6-21)	1. Updated signature block (City Attorney)	The G-200 is used when City is donating goods, including surplus COVID supplies. It must be signed by OCA.
P-550 (1-22) Amendment Template for P-5XX Agreements	Replaces P-550 (6-19)	1. Updated signature blocks (City Attorney and OCA Director) 2. Updated Whereas Clauses	The P-550 should be used to amend all existing “P-5XX” series templates.
P-650 (1-22) Amendment Template for P-6XX Agreements	Replaces P-650 (11-20)	1. Updated signature blocks (City Attorney and OCA Director) 2. Updated Whereas Clauses	The P-650 should be used to amend all existing “P-6XX” series templates.
P-660 (1-22) Assignment & Assumption Template	Replaces P-660 (11-20)	1. Updated signature blocks (City Attorney and OCA Director)	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 (1-22) Novation Template	Replaces P-665 (11-20)	1. Updated signature blocks (City Attorney and OCA Director)	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

Template	Document being Replaced	Substantive Changes	Template Purpose
			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.
P-520 (1-22) Equipment Lease Template	Replaces P-520 (8-15)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 	The P-520 may be used for the lease or rental of equipment.
P-600 (1-22) Professional Services Template	Replaces P-600 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Updated instructions for the application of Prevailing Wage 8. Made Sections 13.4 into Section 13.5. 	The P-600 is the most commonly used template for Professional Services. It is designed to fit most situations.
P-601 (1-22) Professional Services – Individual Contractors	Replaces P-601 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 	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 who has NO employees and NO subcontractors.

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		<ol style="list-style-type: none"> 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Updated instructions for the application of Prevailing Wage 8. Made Sections 13.4 into Section 13.5. 	
P-606 (1-22) Professional Services – Chapter 6	Replaces P-606 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Updated instructions for the application of Prevailing Wage 8. Made Sections 13.4 into Section 13.5. 	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. 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.
P-607 (1-22) Agreement with Public Entities Template	Replaces P-607 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Updated instructions for the application of Prevailing Wage 	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.

Template	Document being Replaced	Substantive Changes	Template Purpose
		8. Made Sections 13.4 into Section 13.5.	
P-629 (1-22) Online Content Licensing Agreement Template	Replaces P-629 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Moved Payment Terms to the end of Article 3 	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 (1-22) Equipment Maintenance Agreement Template	Replaces P-630 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Updated instructions for the application of Prevailing Wage 8. Made Sections 13.4 into Section 13.5. 	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 (1-22) Software Maintenance Agreement Template	Replaces P-640 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Reorganized 3.3.1 5. Updated instructions for Grant Funded contracts 6. Moved Payment Terms to the end of Article 3 	The P-640 may be used for standalone software maintenance for previously purchased licenses.

Template	Document being Replaced	Substantive Changes	Template Purpose
		7. Added applicable part of Section 10.6 back	
P-642 (1-22) Software Development Agreement Template	Replaces P-642 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 7. Made Sections 13.4 into Section 13.5. 	The P-642 is used when hiring a contractor to develop software for the City.
P-645 (1-22) Software Licenses and Maintenance Agreement Template (Without Professional Services)	Replaces P-645 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Reorganized 3.3.1 5. Updated instructions for Grant Funded contracts 6. Moved Payment Terms to the end of Article 3 7. Added applicable part of Section 10.6 back 	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 (1-22) SaaS and Hosted Services Template	Replaces P-648 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated Whereas Clauses 4. Moved Payment Terms to the end of Article 3 5. Updated LBE Payment and Utilization Tracking System terms 6. Updated instructions for Grant Funded contracts 	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,

Template	Document being Replaced	Substantive Changes	Template Purpose
			streamlined clauses, and updated ADA language.
P-649 Software Licenses and Maintenance Agreement Template (<i>With Professional Services</i>)	Replaces P-649 (11-20)	<ol style="list-style-type: none"> 1. Updated signature blocks (City Attorney and OCA Director) 2. Added contractor vaccination terms 3. Updated template name 4. Updated Whereas Clauses 5. Revised 3.3.1 to match P-645 6. Moved Payment Terms to the end of Article 3 7. Updated LBE Payment and Utilization Tracking System terms 8. Updated instructions for Grant Funded contracts 9. Made Sections 15.4 into Section 13.5 	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.